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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Manage Positions  ID: FK1 |

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Document History

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

## Purpose of the Document

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

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

## Purpose of Manage Positions

Position Management is a solution for facilitating a company’s organizational management. It allows the assignment of resources that are needed in the organization, independent from actual employee assignments. Customers can maintain a target organizational structure by creating a central repository of authorized positions. A position enables the hiring of one or more employees with the specified job classification onto the position. Customers can work with positions while there are no incumbents and work with employees when they are incumbents of positions. Position Management ensures employee Job Information is consistent (the Position object drives organizational data like Department, Location, and Job Code).

This document describes the maintenance of positions within the company to keep up-to-date to the business requirements. The maintenance includes the sub processes of creating, updating, and deactivating positions, as well as mass updates to positions, which share common attribute values. The trigger for these sub processes is usually a request from the line manager in whose area of responsibility the position to be created, updated, or deactivated resides.

Once positions are created, employees can be hired on these positions. Changes in an employee’s job information might have impact on the position to which the employee is assigned.

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

 Note

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

## Roles

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

| Business Role | Permission Role | Process Step | Sample Data |
| --- | --- | --- | --- |
| Line Manager   Note  The line manager is maintained in field Supervisor in the Job Information block of the employee. The Job Information block is located in the Employment Information section > Job Information subsection. | SAP BestPractices Position Management Manager (EC) | Refer to chapter Overview Table | Test user: <userid>; Password: <password>  For testing purpose, you can log on as Super Admin and use the Proxy Now option to proxy as the manager role. |
| HR Administrator | For testing purposes, only: use the appropriate Super Admin group to which the role of the SAP BestPractices Position Management Super Admin has been granted | Refer to chapter Overview Table | Test user: <userid>; Password: <password> |
| Administrative Super User | use the appropriate Super Admin group to which the role of the SAP BestPractices Position Management Super Admin has been granted | Refer to chapter Overview Table | Test user: <userid>; Password: <password> |

For creating a new position in the system, the approval of a headcount approver is also required. For this, the dynamic group Headcount Approvers must have been created in SAP SuccessFactors Employee Central. For testing purposes, only, you can log on as Super Admin and use the Proxy Now option to proxy as a member of this group.

In addition, in some workflows the approval of a member of the HR administrator group is also required. For this, the dynamic group HR Administrator must have been created in SAP SuccessFactors Employee Central. For testing purposes, only, you can log on as Super Admin and use the Proxy Now option to proxy as a member of this group.

## Master Data, Organizational Data, and Other Data

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

Use your own master data to go through the test procedure: below table gives an example of how your sample data could look like:

| Data | Sample Value | Details | Comments |
| --- | --- | --- | --- |
| <Position Org Chart> | <CEO> | Position hierarchy starting from CEO | This is a sample org chart created for testing |
| <Org Chart> | <person name> | Reporting hierarchy starting from <person name> | This is a sample org chart created for testing |
| Position Code | Position\_1 | Auto-generated |  |
| Title | CEO |  |  |
| Status | Active |  |  |
| Start Date | <start date> | Format is country specific |  |
| Position Title | CEO |  |  |
| Incumbent | <name of person assigned to position> |  |  |
| Job Code | CEO |  |  |

## 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 | The job classifications must be in place. | Nevertheless, in chapter Preliminary Steps we give a short description of how job classifications can be created from the administration section of Employee Central. |
| 3 | The organization structure consisting of legal entity, business units, and possibly divisions and departments, must have been created in your instance. | If this is not the case, follow one of the below options:   * In case the Company Structure Overview functionality has been implemented in your Employee Central instance using the SAP Best Practices, complete all necessary steps described in the test script of scope item Manage Company Structure (2OY). * In case the Company Structure Overview functionality has not been implemented in your Employee Central instance, the data can be created from the administration section of Employee Central, as shortly described in chapter Preliminary Steps. |
| 4 | Following employees must already exist in the system: the requesting line manager, a headcount approver, and an HR administrator.  The requesting line manager must have at a least a direct report to be able to access the Position Org Chart. |  |
| 5 | The dynamic group Headcount Approver must have been created in Employee Central. | For the creation of a position, the approval from a member of the Headcount Approver dynamic group needed. |
| 6 | The dynamic group HR Administrator must have been created in Employee Central. | For several requests described in this document, the approval from a member of the HR Administrator dynamic group is needed for the changes to become effective. |

## Preliminary Steps

### Creating Job Classification

Use

In case additional job classifications than the ones delivered with this SAP Best Practices are needed, the Administrative Super User can create these.

Procedure

1. Log on to Employee Central as an Administrative Super User.
2. From the Home drop-down, select Admin Center.
3. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Data.
4. On the Manage Data screen, in the Create New field select JobClassification from the drop-down.
5. In the Job Classification portlet, make the following entries:

Note

In the system, required fields are marked with an asterisk. In addition, we mention the optional fields that are reasonable to be maintained.

| Field Name | Description | User Action and Values |
| --- | --- | --- |
| Effective as of | Validity start date of new job classification | today's date is defaulted, adapt as appropriate |
| Job Code |  | enter as appropriate |
| Job Title |  | enter as appropriate |
| Description |  | enter if appropriate |
| Status |  | Active |
| defaultJobLevel |  | select from drop-down |
| Standard Weekly Hours |  | enter as appropriate |
| Regular/Temporary |  | select for example Regular from drop-down |
| Is Full Time Employee |  | No is defaulted, adapt as appropriate |
| Pay Grade |  | select from drop-down |
| Job Function |  | select from drop-down |

1. If needed, you can add country-specific details. For this, choose in the Job Classification Countries section of the portlet a Country from the drop-down. Select the Details link next to the selected country. In the upcoming Details dialog box, enter values as appropriate. Then select the Done button.
2. Choose the Save button to save the record.

Result

A new job classification has been created.

### Creating Company Structure

Use

In case the company structure has not been set up yet, depending on the option used, either the HR Administrator or the Administrative Super User creates instances of organization objects, like business units, divisions, or departments.

In case the Company Structure Overview module has been implemented in the Employee Central instance using the SAP Best Practices, the HR Administrator can execute all necessary steps described in the test script of scope item Manage Company Structure (2OY).

In case the Company Structure Overview module has not been implemented in the Employee Central instance, the company structure needs to be created using the Administration Tools. In this case, the steps are executed by the Administrative Super User, as he or she has the appropriate permissions. In the following, we give as example the creation of a business unit using the Administration Tools. In addition, we highlight the additional fields to be filled in case of creating a division or department.

Prerequisites

The legal entity must be in place.

Procedure

1. Log on to Employee Central as an Administrative Super User.
2. From the Home drop-down, select Admin Center.
3. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Data.
4. On the Manage Data screen, in the Create New field select BusinessUnit from the drop-down.
5. In the Business Unit portlet, make the following entries:

Note

Required fields are marked with an asterisk.

| Field Name | Description | User Action and Values | Comment |
| --- | --- | --- | --- |
| Effective as of | Validity start date of new business unit | today's date is defaulted, adapt as appropriate |  |
| Code | Business unit code | enter as appropriate |  |
| Name | Business unit name | enter as appropriate | Optional field but reasonable to maintain |
| Description |  | enter as appropriate |  |
| Status |  | Active is defaulted; leave as is |  |
| Head of Unit | Name of business unit head | select from drop-down if an appropriate employee exists |  |

1. Choose the Save button to save the record.

Note

For divisions and departments, similar data needs to be maintained. With respect to business units, following data should be maintained in addition:

* For a division: the business unit, to which it should belong, and a parent division, if appropriate.
* For a department: the division, to which it should belong, the cost center, and a parent department, if appropriate.

Result

The organization structure has been created in your Employee Central instance.

### Creating First Position in the Instance

Use

The first position in the instance can be created either from the administration tools or from the position org chart. The other positions can then be created starting from this position by using the position organization chart. Therefore, you should start with the highest position in the company, for example the CEO.

 Caution

The permission to create positions from the administration tools is reserved for the administrative super users.

Prerequisites

The legal entity (company) and at least one business unit must have been created.

Procedure

1. Log on to Employee Central as an Administrative Super User. Proceed with one of below options:
2. Option 1: Using the Administration Tools:

* From the Home drop-down, select Admin Center.
* In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Data.
* On the Manage Data screen, in the Create New field select Position from the drop-down.
* Continue with activity # 3 below.

Option 2: Using the Position Org Chart:

* From the Home drop-down, select Company Info.
* On the Company Info screen, go to the Position Org Chart tab.
* On the Position Org Chart screen, select the Add Position  icon located on the top right of the screen.
* Continue with activity # 3 below.

1. In the Position portlet, make the following entries:

| Field Name | User Action and Values | Comment |
| --- | --- | --- |
| Title | for example,CEO | Title of position |
| Status | Active is defaulted; leave as is | Status of position |
| Start Date | today's date is defaulted, adapt as appropriate | Validity start date of new position |
| To Be Hired | Yes is defaulted; leave as is |  |
| FTE | 1 is defaulted; adapt if appropriate | Full-time equivalent |
| Type | only in case multiple incumbents are allowed select SP (meaning Shared Position) from drop-down; else select RP (meaning Regular Position) | Type of position.  In rare cases, more than one CEO can exist. |
| Subject to Position Control | Select Yes from drop-down | If set to Yes, this field will check the FTE value on a position. In case the number of incumbents has reached the FTE value, no new incumbent can be hired on this position. |
| Mass Position | only in case multiple incumbents are allowed select Yes from drop-down; else leave No | In rare cases, more than one CEO can exist. |
| Job Code | select for example CEO(EXE-CEO)from drop-down | Following fields will be auto-populated from the value you have chosen: Job Title, Job Level, Regular/Temporary, and Pay Grade. |
| Country | select from drop-down | This is a custom field and it is the customer’s choice to set it up or not. If set up, this field is used for filtering the value list of employee class based on the country chosen. |
| Employee Class | select from drop-down |  |
| Employment Type | select from drop-down | This is a custom field and it is the customer’s choice to set it up or not. If set up, then available values are restricted based on the employee class chosen. |
| Company | select from drop-down | In case field Country has been set up, select a value that fits to the selected country. |
| Business Unit | select from drop-down |  |
| Division | select from drop-down |  |
| Department | select from drop-down |  |
| Location | select from drop-down | Location should fit to the country where the company is located. |
| Cost Center | select from drop-down |  |
| Standard Weekly Hours | enter as appropriate, for example 40 |  |
| Fields in the Matrix Relationship section of the portlet: Type/Related Position | leave empty | For the first position this is not relevant |
| Higher-Level Position | leave empty | Parent position of new position.  For the first position, there is no higher-level position in the system. |

1. Choose the Save button to save the record.

Result

The new position has been saved and the value in field Code has been generated automatically. This first position can be used as starting point for creating other positions using the position organization chart.

In addition, an employee can already be hired on this position.

Note

In case the Core content in your SAP SuccessFactors Employee Central instance has been deployed with the SAP Best Practices, you can refer to test script of scope item Add New Employee / Rehire (FJ0) for this.

In case employees already exist in the SAP SuccessFactors Employee Central instance at the point in time when Position Management is implemented, these employees can be assigned to the newly created position as appropriate. This is sketched in the Appendix of this document.

 Recommendation

The administrative super user should create additional positions on which employees can be hired. As mentioned in chapter Business Conditions, several employees need to exist in the system in order to execute the sub-processes as described in this document.

# Overview Table

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

 Note

Some of the process steps can be executed using the Mobile App. These process steps are mentioned accordingly, for details see the Transaction Code column of below table. The procedure of executing these process steps using Mobile App is sketched the Appendix of this document.

| Process Step | UI Type | Business Condition | Business Role | Transaction Code | Expected Results |
| --- | --- | --- | --- | --- | --- |
| View Position Details | Employee Central UI | At least one position has already been created using the administration tools. | HR Administrator | Company Instance URL | Details of a specific position have been viewed. |
| Position Creation (Sub-Process) | | | | | |
| Request Position Creation | Employee Central UI | Additional headcount in the area of responsibility of the line manager is required. | Line Manager | Company Instance URL | The line manager has requested for the creation of a position within his / her area of responsibility.  The creation of the position is pending upon approval of the workflow. |
| Receive Position Creation Request Notification | E-Mail |  | Member of dynamic group Headcount Approver | outside software | The members of the Headcount Approver dynamic group have received the position creation request. One of the group members picks up the request. |
| Check Attributes of Requested Position | Employee Central UI |  | Member of dynamic group Headcount Approver | Company Instance URL or Mobile App | The member of the Headcount Approver dynamic group has checked the attributes of the new requested position. |
| Check Budget Availability for Requested Position | - |  | Member of dynamic group Headcount Approver | outside software | The member of the Headcount Approver dynamic group has checked if the new position has been budgeted for. |
| Option 1: Approve Position Creation Request | Employee Central UI | There is budget planned for a new position. | Member of dynamic group Headcount Approver | Company Instance URL or Mobile App | The member of the Headcount Approver dynamic group has approved the position creation request. The workflow has been sent to the next processor. |
| Option 2: Reject Position Creation Request | Employee Central UI | No budget is planned for a new position. | Member of dynamic group Headcount Approver | Company Instance URL or Mobile App | The member of the Headcount Approver dynamic group has rejected the position creation request. The workflow has been sent back to the requesting line manager. |
| Option 2 (continued): Receive Position Creation Rejection Notification | E-Mail |  | Line Manager | outside software | The line manager has received a notification about the rejection of his or her position creation request. |
| Option 2 (continued): Withdraw Position Creation Request | Employee Central UI | The member of the Headcount Approver dynamic group has rejected position creation request. | Line Manager | Company Instance URL | The requesting line manager withdraws his/her request. |
| Option 1: Approve Position Creation | Employee Central UI | The member of the Headcount Approver dynamic group has approved the position creation request.  A member of the HR Administrator dynamic group has picked up the request. The data maintained in the request is correct and complete. | Member of dynamic group HR Administrator | Company Instance URL or Mobile App | The member of the HR Administrator dynamic group has approved the position creation in the system. The new position becomes effective the date as entered in the system. |
| Option 1 (continued): Send Position Creation Completion Notification | Back-ground |  |  |  | A notification about the completion of the position creation request has been sent to the requesting line manager. |
| Option 1 (continued): Receive Position Creation Completion Notification | E-Mail |  | Line Manager | outside software | The requesting line manager has received a notification about the completion of the position creation request. |
| Option 2: Request Additional Information about Position | Employee Central UI | The member of the Headcount Approver dynamic group has approved the position creation request.  A member of the HR Administrator dynamic group has picked up the request. The data maintained in the request is not correct or incomplete. | Member of dynamic group HR Administrator | Company Instance URL or Mobile App | The member of the HR Administrator dynamic group has sent the request back to the line manager, asking for additional information about the new position to be created. |
| Option 2 (continued): Receive Additional Information Request | E-Mail |  | Line Manager | outside software | The line manager has received an e-mail with the request to provide additional information to the new position to be created. |
| Option 2 (continued): Update Position Creation Request | Employee Central UI | Additional information about the new position is required. | Line Manager | Company Instance URL | The line manager has updated the request and sent it back to the Headcount Approver dynamic group for approval. A new loop in the approval process starts, |
| View New Position | Employee Central UI |  | Line Manager | Company Instance URL | The line manager has viewed the new position in the Position Organization Chart. |
| Create Positions by Copying (Optional) | Employee Central UI | At least one position has already been created using the administration tools. | HR Administrator | Company Instance URL | New positions have been created by copying an existing one and possibly some of the attributes have been adjusted. |
| Position Update (Sub-Process) | | | | | |
| Request Position Update | Employee Central UI |  | Line Manager | Company Instance URL | The line manager has requested for the update of a position within his / her area of responsibility.  The update of the position is pending upon approval of the workflow. |
| Receive Position Update Request Notification | E-Mail |  | Member of dynamic group HR Administrator | outside software | The members of the HR Administrator dynamic group have received the position update request. One of the group members picks up the request. |
| Option 1: Approve Position Update Request | Employee Central UI | The data maintained in the request is correct and complete. | Member of dynamic group HR Administrator | Company Instance URL or Mobile App | The member of the HR Administrator dynamic group has approved the position update in the system. The updated data of the position becomes effective the date as entered in the system. |
| Option 1 (continued): Approve Employee Job Information Update (Optional) | Employee Central UI | The updated position has already an incumbent and the decision to synchronize position data with job information data has been taken. | Line Manager | Company Instance URL or Mobile App | The line manager has approved the update of the incumbent’s job information. The change in job information becomes effective the date as entered in the system. |
| Option 1 (continued): Notify Employee about Job Information Change (Optional) | Back-ground |  |  |  | A notification about changes in the job information induced by the line manager has been sent to the appropriate employee. |
| Option 1 (continued): Receive Job Information Change Notification (Optional) | E-Mail |  | Employee | outside software | The employee has received a notification about the changes in his/her job information induced by the line manager. |
| Option 1 (continued): View Employee Job Information Details (Optional) | Employee Central UI |  | HR Administrator | Company Instance URL | The updated job information of the employee has been viewed. |
| Option 2: Send Back Position Update Request for Correction | Employee Central UI | The data maintained in the request is not correct or incomplete. | Member of dynamic group HR Administrator | Company Instance URL or Mobile App | The member of the HR Administrator dynamic group has sent the request back to the line manager, asking for correcting the request details. |
| Option 2 (continued): Receive Correction Request for Position Update | E-Mail |  | Line Manager | outside software | The line manager has received an e-mail with the request to provide additional information to the position update request. |
| Option 2 (continued): Adapt Position Update Request | Employee Central UI | Rework of the request is required. | Line Manager | Company Instance URL | The line manager has updated the request and sent it back to the HR Administrator dynamic group for approval. |
| View Updated Position | Employee Central UI |  | Line Manager | Company Instance URL | The line manager has viewed the updated position in the Position Organization Chart. |
| Position Deactivation (Sub-Process) | | | | | |
| Request Position Deactivation | - | The position has become obsolete and is not relevant anymore for reporting purposes. All possible incumbents have been moved to other positions. | Line Manager | outside software | A position deactivation request has been sent to the HR administrator. |
| Receive Position Deactivation Request | - |  | HR Administrator | outside software | The HR administrator has received the position deactivation request. |
| Deactivate Position | Employee Central UI |  | HR Administrator | Company Instance URL | The position has been deactivated. |
| Notify Line Manager about Position Deactivation Completion | - |  | HR Administrator | outside software | The position deactivation completion notification has been sent to the requesting line manager. |
| Receive Position Deactivation Completion Notification | - |  | Line Manager | outside software | The requesting line manager has received the position deactivation completion notification. |
| Mass Changes for Positions (Sub-Process) | | | | | |
| Request Position Mass Change | - |  | Organizational Design Expert | outside software | A position mass change request has been sent to the administrative super user. |
| Receive Position Mass Change Request | - |  | Administrative Super User | outside software | The administrative super user has received the position mass change request. |
| Create Position Mass Change Rule | Employee Central UI |  | Administrative Super User | Company Instance URL | A position mass change rule has been created. |
| Create Position Mass Change Run | Employee Central UI |  | Administrative Super User | Company Instance URL | A position mass change run has been created. |
| Execute Position Mass Change Simulation Run | Employee Central UI |  | Administrative Super User | Company Instance URL | The position mass change run has been simulated. |
| Monitor Position Mass Change Simulation Run | Employee Central UI |  | Administrative Super User | Company Instance URL | The simulated position mass change run has been monitored. |
| Execute Position Mass Change Run | Employee Central UI | No errors in position mass change simulation run | Administrative Super User | Company Instance URL | The productive position mass change run has been executed. |
| Update Positions | Back-ground |  |  |  | The positions have been updated automatically by the mass change run. |
| Update Employees Job Information (Optional) | Back-ground | The updated positions have already incumbents. |  |  | The job information of the employees has been updated automatically based on the propagation rule defined for position to job info synchronization. |
| Monitor Position Mass Change Run | Employee Central UI |  | Administrative Super User | Company Instance URL | The productive position mass change run has been monitored. |
| View Positions Updates | Employee Central UI |  | Administrative Super User | Company Instance URL | The updates of positions as result of the mass change run have been viewed. |
| View Employee Job Information Details (Optional) | Employee Central UI | The updated positions have already incumbents. | Administrative Super User | Company Instance URL | The updated job information of the employees has been viewed. |
| Notify Employees about Job Information Change (Optional) | - | The updated positions have already incumbents. | Administrative Super User | outside software | The employees have been notified about the change in his or her job information. |
| Notify Organizational Design Expert about Position Mass Change Completion | - |  | Administrative Super User | outside software | The position mass change completion notification has been sent to the requesting organizational design expert. |
| Receive Position Mass Change Completion Notification | - |  | Organizational Design Expert | outside software | The requesting organizational design expert has received the position mass change completion notification. |

# Testing the Process Steps

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

The test should around 70 minutes.

## Viewing Position Details

Test Administration

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

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

Purpose

The HR Administrator views details of a specific position. For this, he or she uses the Position Organization Chart.

The position organization chart is a graphical representation of positions, who occupies them, and how they relate to other positions, whether those are higher-level positions, lower-level positions, or peer positions.

Prerequisites

At least one position must have already been created (see subchapter Creating First Position in the Instance of chapter Preliminary Steps).

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search 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 you want to view.  Click on the calendar icon  located in the top right corner of the screen and select an appropriate date from the calendar help. | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. For each position, visible in the org chart, following details are shown:   * (Position) Code * (Position) Title * Job Title * Details about the organization to which the position belongs to * Number of current / target FTEs * Current incumbent, if existing   For the lower-level positions (if existing) the number of subordinated positions, and/or subordinated matrix positions, if any, is displayed. |  |
| 4 | View Subordinated Positions of Lower-Level Position (Optional) | In case a lower-level position has subordinated positions, you can view these by selecting <#> Position Below. | The positions become visible below the parent position. |  |
| 5 | View High-Level Position Data | To view data of a position, click in the position org chart on that position. | A side panel containing detailed and calculated information about the position and related objects shows up. |  |
| Choose Position Details. | The menu is expanded and organizational details are shown. |  |
| Choose Position History. | The menu is expanded and administrative details are shown. |  |
| Choose Position Hierarchy Details.   Caution  This option is available in the side panel only if the position has other positions directly below. | The menu is expanded and administrative details to the lower-level positions of the selected position are shown. |  |
| 6 | View Current Incumbent (Optional) | To view the current holder of a position, choose in the side panel of that position Incumbent Details.   Caution  This option is available in the side panel only if the position has currently at least one incumbent. | The menu is expanded and administrative details of the incumbent are shown. |  |
| 7 | View Detailed Position Data | To view the detailed information of a position, click in the side panel on the Show Position icon.  Note  This icon is located below the <position title (code)>, next to as of <selected date>. | The Position: <position title (code)> window shows up containing the position details. |  |
| 8 | Close Window | When done with viewing the details, choose X (Cancel). |  |  |
| 9 | Select History of Incumbents | To view the history of position holders, click in the side panel of the position on 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. |  |
| 10 | View History of Position Holders | In the From and To fields select appropriate dates from the calendar help. | Details of the employee occupying the position during the selected period are shown. If there was no incumbent during the selected period, an appropriate message is shown in the Incumbent History dialog box. |  |
| 11 | Close Dialog Box | When done, choose the Close button. |  |  |

## Position Creation (Sub-Process)

 Recommendation

For ease of consumption of the documentation within this chapter, it is recommended to check in parallel the process flow sketched in the appropriate process diagram FK1\_SFHCM1802\_Process\_Overview\_EN\_XX.pptx.

### Requesting Position Creation

Test Administration

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

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

Purpose

Once the need for additional headcount within an organizational unit arises, the Line Manager (called Supervisor in the Employee Central system) of that organizational unit requests the creation of a new position within his or her area of responsibility. To do so, the line manager uses the Position Organization Chart, with which the position can very easily be placed into the existing position hierarchy. Upon submitting the details of the new position, a workflow item is triggered, which needs to be approved by a member of each of the Headcount Approver and HR Administrator dynamic groups.

The Line Manager has following options:

1) Creating a lower-level position to an existing position (test steps # 4 to # 10 in the Procedure table below),

2) Creating a peer position to an existing position (test steps # 11 to # 17 in the Procedure table below).

In the following, we describe both possibilities. Of course, based on your specific business case, you can decide to consider only one of these options.

Prerequisites

Positions have already been created as described in subchapter Creating First Position in the Instance of chapter Preliminary Steps.

The line manager must be assigned to a position. The line manager must have at least one direct report to be able to access the Position Organization Chart.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Line Manager. |  |  | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. |  |  | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. The directly subordinated employee(s) are also shown. |  |
| 3 | Go to Position Org Chart | Go to the Position Org Chart tab. |  |  | The position hierarchy as of today starting with your position and containing one level below is displayed. For each position, visible in the org chart, following details are shown:   * (Position) Code * (Position) Title * Job Title * Details about the organization to which the position belongs to * Number of current / target FTEs * Current incumbent, if existing   For the lower-level positions, the number of subordinated positions, if any, is displayed. |  |
| 4 | Create Lower-Level Position | Click a position. In the upcoming side panel, next to the position choose the Show Menu  icon, and in the upcoming small callout choose Add Lower-Level Position. |  | The position to be chosen as template for creating a new lower-level position can be your own position or any other position below your position. | The Position dialog box opens having several fields pre-populated with the details of the chosen position. The Higher-Level Position field is filled with the position you selected and is read-only. |  |
| 5 | Fill-in Position Fields | Fill in the details of the new position you want to create:   Caution  If you set fields Subject to Position Control to Yes, Type to SP and Mass Position to Yes, make sure to maintain an appropriate value for FTE in order to be able to hire several employees on that position. Refer also to the additional information maintained for the mentioned fields. | Title: enter as appropriate |  |  |  |
| Status: defaults to Active; leave as is |  |  |
| Start Date: enter as appropriate using calendar help | Today’s date is defaulted. |  |
| To Be Hired: defaults to Yes; leave as is |  |  |
| FTE: 1 is defaulted; adapt if appropriate |  |  |
| Type: select from drop-down RP in case of a Regular Position, or SP (meaning Shared Position) in case multiple incumbents are allowed |  |  |
| Subject to Position Control: select for example Yes from drop-down | If set to Yes, the FTE value on a position will be checked. In case as result of a hiring/rehiring action the number of incumbents is exceeding the FTE value, the hiring/rehiring on this position will be denied. |  |
| Mass Position: only in case multiple incumbents are allowed select Yes from drop-down; else leave No | Caution  If you select Yes, then you must enter value SP in Type field, otherwise the system does not react correctly when for one of the incumbents of a shared position a position reclassification or position transfer is required.  Note  In case the Core content has been deployed with the SAP Best Practices, you can refer for details on position reclassification or position transfer to test script of scope item FJ1. |  |
| Job Code: select from drop-down | Following fields will be auto-populated from the value you have chosen: Job Title, Job Level, Regular/Temporary, and Pay Grade; adapt if needed, else leave as is |  |
| Country: select from drop-down the same value as selected in activity # 3 of preliminary step Creating First Position in the Instance | This is a custom field and it is the customer’s choice to set it up or not. If set up, this field is used for filtering the value list of employee class based on the country chosen. |  |
| Employee Class: select from drop-down | In case Apprentice Management has been implemented in the instance and you want to create a position for apprentices, select the appropriate employee class as defined in the selected country for apprentices.  In case Contingent Workforce Management has been implemented in the instance and you want to create a position for contingent workers, select the appropriate employee class as defined in the selected country for contingent workers. |  |
| Employment Type: select from drop-down | This is a custom field and it is the customer’s choice to set it up or not. If set up, then available values are restricted based on the employee class chosen. |  |
| The values of fields Company, Business Unit, Division, Department, Location, and Cost Center are pre-populated with the details of the position acting as template for the new position you are creating. Adapt values in these fields as per the requirements. | Make sure that the values fit to the country selected! |  |
| Standard Weekly Hours: enter as appropriate, for example 40 |  |  |
| If appropriate, make following entries in the Matrix Relationship section: | Type: select Matrix Manager(matrix manager) from drop-down | Type of matrix relationship |  |
| Related Position: select from drop-down | The position to which the created position has the specific job relation type Matrix Manager. |  |
| 6 | Save Data | Choose the Save button. |  |  | The Please confirm your request dialog box displays on the screen. |  |
| 7 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |  |
| 8 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  |  | The Headcount Approver dynamic group and the HR Administrator dynamic group are shown as approvers. |  |
| 9 | Confirm Workflow | Select the Confirm button. |  |  | The Code of the new position has been generated automatically.  The message This is non-actionable(to be approved)record is displayed in the Position: <position title (code)> dialog box. The workflow has been sent to the next processor, namely the Headcount Approver dynamic group. |  |
| 10 | Go Back to Position Org Chart | Choose X (Cancel) to close the dialog box. |  |  | You return to the Position Org Chart screen. Note that the new position requested by you is not yet visible in the Position Org Chart. |  |
| 11 | Create Peer Position | Click on the position, which you want to use as template for creating another position. In the upcoming side panel, next to the position choose the Show Menu  icon, and in the upcoming small callout choose Add Peer Position. |  | The position to be chosen as template for creating a new peer position can be any position below your position. | The Position dialog box opens having several fields pre-populated with the details of the chosen position. The Higher-Level Position field is filled with the higher-level position of the selected position and is read-only. |  |
| 12 | Fill-in Position Fields | Fill in the details of the new position you want to create at the same level with the position you have chosen:   Caution  If you set fields Subject to Position Control to Yes, Type to SP and Mass Position to Yes, make sure to maintain an appropriate value for FTE in order to be able to hire several employees on that position. Refer also to the additional information maintained for the mentioned fields. | Title: enter as appropriate |  |  |  |
| Status: defaults to Active; leave as is |  |  |
| Start Date: enter as appropriate using calendar help | Today’s date is defaulted. |  |
| To Be Hired: defaults to Yes; leave as is |  |  |
| FTE: 1 is defaulted; adapt if appropriate |  |  |
| Type: select from drop-down RP in case of a Regular Position, or SP (meaning Shared Position) in case multiple incumbents are allowed |  |  |
| Subject to Position Control: select for example Yes from drop-down | If set to Yes, the FTE value on a position will be checked. In case as result of a hiring/rehiring action the number of incumbents is exceeding the FTE value, the hiring/rehiring on this position will be denied. |  |
| Mass Position: only in case multiple incumbents are allowed select Yes from drop-down; else leave No | Caution  If you select Yes, then you must enter value SP in Type field, otherwise the system does not react correctly when for one of the incumbents of a shared position a position reclassification or position transfer is required.  Note  In case the Core content has been deployed with the SAP Best Practices, you can refer for details on position reclassification or position transfer to test script of scope item FJ1. |  |
| Job Code: select from drop-down | Following fields will be auto-populated from the value you have chosen: Job Title, Job Level, Regular/Temporary, and Pay Grade; adapt if needed, else leave as is |  |
| Country: select from drop-down, the same value as selected in activity # 3 of preliminary step Creating First Position in the Instance | This is a custom field and it is the customer’s choice to set it up or not. If set up, this field is used for filtering the value list of employee class based on the country chosen. |  |
| Employee Class: select from drop-down | In case Apprentice Management has been implemented in the instance and you want to create a position for apprentices, select the appropriate employee class as defined in the selected country for apprentices.  In case Contingent Workforce Management has been implemented in the instance and you want to create a position for contingent workers, select the appropriate employee class as defined in the selected country for contingent workers. |  |
| Employment Type: select from drop-down | This is a custom field and it is the customer’s choice to set it up or not. If set up, then available values are restricted based on the employee class chosen. |  |
| The values of fields Company, Business Unit, Division, Department, Location, and Cost Center are pre-populated with the details of the position acting as template for the new position you are creating. Adapt values in these fields as per the requirements. | Make sure that the values fit to the country selected! |  |
| Standard Weekly Hours: enter as appropriate, for example 40 |  |  |
| If appropriate, make following entries in the Matrix Relationship section: | Type: Matrix Manager(matrix manager) | Type of matrix relationship |  |
| Related Position: select from drop-down | The position to which the created position has the specific job relation type Matrix Manager. |  |
| 13 | Save Data | Choose the Save button. |  |  | The Please confirm your request dialog box displays on the screen. |  |
| 14 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |  |
| 15 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  |  | The Headcount Approver dynamic group and the HR Administrator dynamic group are shown as approvers. |  |
| 16 | Confirm Workflow | Select the Confirm button. |  |  | The Code of the new position has been generated automatically.  The message This is non-actionable(to be approved)record is displayed in the Position: <position title (code)> dialog box. The workflow has been sent to the next processor, namely the Headcount Approver dynamic group. |  |
| 17 | Go Back to Position Org Chart | Choose X (Cancel) to close the dialog box. |  |  | You return to the Position Organization Chart screen. Note that the new position requested by you is not yet visible in the Position Org Chart. |  |

#### Receiving Position Creation Request Notification

Purpose

It is assumed that email is configured and the email addresses of all employees are maintained in the system. Under this assumption, the members of the Headcount Approver dynamic group have received an email notification informing them that the Line Manager has submitted a position creation request.

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

### Checking Attributes of Requested Position

Test Administration

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

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

Purpose

One of the members of the Headcount Approver dynamic group picks up the workflow item containing the position creation request submitted by the line manager. Before checking if the new position is budgeted for, the member of the Headcount Approver dynamic group needs to check the attributes of the requested position.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the Headcount Approver dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Creation Request | In the Approve Requests dialog box, click on the Create Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions, for field Object value Position, and in field Requested By the name of the line manager who requested the position creation. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Create Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the creation request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position that should be created. * In the Comment section, remarks can be posted. * On the right part of the screen a short profile of the line manager who requests the position creation is given, as well as administrative details to the request initiation. |  |
| 4 | Review New Position Details | Review in the Position section the attributes of the new position requested by the line manager. | After having checked the attributes the new position should have, you can verify if there is any budget allocated for a new position, in particular the one you just have checked. |  |

### Checking Budget Availability for Requested Position (process step outside software)

Purpose

After having received the position creation request and checked the attributes the new position should have, the member of the Headcount Approver dynamic group, before processing this request, needs to check if there is enough budget planned for a new position.

Result

Depending on the outcome of the analysis, the member of the Headcount Approver dynamic group will either approve the position creation request or reject the position creation request.

### Processing Position Creation Request

Purpose

After having checked if the new position is budgeted for, the member of the Headcount Approver dynamic group processes the position creation request submitted by the line manager.

In case enough budget for the new position is available, the member of the Headcount Approver dynamic group approves the request. In this case, the form progresses to the HR Administrator dynamic group for further processing,

In case the new position has not been budgeted for, the member of the Headcount Approver dynamic group rejects the request. In this case, the form is sent back to the line manager and will be withdrawn by the same.

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

#### Option 1: Approving Position Creation Request

Test Administration

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

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

Purpose

In case the new position is budgeted for, the member of the Headcount Approver dynamic group approves the position creation request.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the Headcount Approver dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Creation Request | In the Approve Requests dialog box, click on the Create Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions,for field Object value Position, and in field Requested By the name of the line manager who requested the position creation. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Create Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the creation request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position that should be created. * In the Comment section, you can post your remarks to the creation request. * On the right part of the screen a short profile of the line manager who requests the position creation is given, as well as administrative details to the request initiation. |  |
| 4 | Approve Request | Choose the Approvebutton to approve the position creation request. | The system generates a message about the successful approval of the workflow request. The workflow has been sent to the next processor. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page.  Continue in the process execution with process step 4.2.5 Processing Approved Position Creation Request. |  |

 Note

In case email is configured and the email address of the members of the HR Administrator dynamic group are maintained in the system, they receive automatic emails about the workflow item needing their attention.

In addition, the requesting line manager receives an email notification, too. He or she can access the system via the link provided in this email to check details to the workflow activities so far.

#### Option 2: Rejecting Position Creation Request

Test Administration

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

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

Purpose

In case there is no budget available for a new position, the member of the Headcount Approver dynamic group rejects the position creation request.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the Headcount Approver dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Creation Request | In the Approve Requests dialog box, click on the Create Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions,for field Object value Position, and in field Requested By the name of the line manager who requested the position creation. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Create Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the creation request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position that should be created. * In the Comment section, you can post your remarks to the creation request. * On the right part of the screen a short profile of the line manager who requests the position creation is given, as well as administrative details to the request initiation. |  |
| 4 | Reject Request | Enter a comment explaining your decision to reject the position creation request, and choose the Send Backbutton. | The Send Back Request dialog box is displayed, informing you that the request will be sent back to the request initiator (line manager in this case) and he or she will be notified. |  |
| 5 | Confirm your Choice | Choose again the Send Backbutton. | The system generates a success message and you are directed back to your Home page. The workflow has been sent back to the requesting line manager.   Note  In case you have rejected the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page.  Continue with process steps 4.2.4.2.1 Receiving Position Creation Rejection Notification and 4.2.4.3 Withdrawing Position Creation Request. |  |

##### Option 2 (continued): Receiving Position Creation Rejection Notification

Purpose

In case the member of the Headcount Approver dynamic group has rejected the position creation request due to missing budget, the Line Manager receives an automatic e-mail notifying him or her about the rejection.

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

#### Option 2 (continued): Withdrawing Position Creation Request

Test Administration

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

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

Purpose

In case the member of the Headcount Approver dynamic group has rejected the position creation request, the Line Manager cancels the request.

Procedure

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Go to your e-mail inbox and search the e-mail from the member of the Headcount Approver dynamic group who has rejected your request.  Note  The subject of this email states something like ”The Create Position action for <position title> has been sent back by <headcount approver name>.”  Open this e-mail and choose the available hyperlink. You are directed to the Employee Central login screen, where you need to enter your password (your username is already filled by default). | Alternatively, you can log on to Employee Central, go on the Home page to theTo Dosection and click on the Approve Requests tile. In the upcoming Approve Requests dialog box, click on the Create Position link next to Name: <position title>. | You are directed to the Employee Files > Workflow Details page containing details to the request. |  |
| 2 | Withdraw Request | To cancel the position creation request, select the Withdraw link at the bottom of the page. |  | The WITHDRAW REQUEST dialog box is displayed, asking you if you really want to withdraw the request. |  |
| 3 | Confirm your Choice | Choose the Yesbutton. |  | The system generates a success message and you are directed back to your Home page. |  |

Result

The creation of the new position has been withdrawn. With this, the process ends.

### Processing Approved Position Creation Request

Purpose

After the member of the Headcount Approver dynamic group has approved the position creation request submitted by the line manager, the workflow item has been sent to the HR Administrator dynamic group for further processing. One of the members of the HR Administrator dynamic group picks up the workflow item and checks the position attributes maintained in the request.

In case the attributes of the new position are complete and correct, the member of the HR Administrator dynamic group approves the position creation in the system. In this case, the new position becomes effective in the system and can be used for further processes, like hiring an employee on it.

In case the attributes of the new position are incomplete or not correct, the member of the HR Administrator dynamic group sends the form back to the requesting manager. He or she needs to update and resubmit it again for approval by both the Headcount Approver and the HR Administrator dynamic groups.

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

#### Option 1: Approving Position Creation

Test Administration

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

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

Purpose

After a member of the Headcount Approver dynamic group has approved position creation request, the request needs to be approved by a member of the HR Administrator dynamic group, too, in order for the position to take effect in the system. Until the creation request is approved, the position is pending and cannot be used for further processes.

In this process step, a member of the HR Administrator dynamic group will need to complete the workflow by selecting the create request, reviewing the position attributes and then lastly approving the request.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the HR Administrator dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Creation Request | In the Approve Requests dialog box, click on the Create Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions,for Object value Position, and in field Requested By the name of the line manager who requested the position creation. Then choose the Go button. In case there are several requests of this type, you have also the option to sort them, for example based on the date you received them, in order to ensure a timely completion of them. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Create Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the creation request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position that should be created. * In the Comment section, you can post your remarks to the creation request. * On the right part of the screen a short profile of the line manager who requests the position creation is given, as well as administrative details to the workflow activities until now. |  |
| 4 | Review Position Details | Check in the Position section if the attributes of the position are complete and correct. | The attributes of the new position have been reviewed; these are complete and correct. |  |
| 5 | Approve Request | If everything is fine, choose the Approvebutton to approve the position creation. | The system generates a message about the successful approval of the workflow request. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page.  The new position becomes effective the date as entered in the system and can be viewed by the Line Manager in the Position Organization Chart. |  |

##### Option 1 (continued): Sending Position Creation Completion Notification

Purpose

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

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

##### Option 1 (continued): Receiving Position Creation Completion Notification

Purpose

The requesting Line Manager has received the notification that a member of the HR Administrator dynamic group has approved the position creation he or she has requested. He or she can access the system via the link provided in this email to check details to the workflow activities. The position can be viewed in the position org chart and an employee can now be hired on this position.

 Note

In case the Core content in your SAP SuccessFactors Employee Central instance has been deployed with the SAP Best Practices, you can refer to test script of scope item Add New Employee / Rehire (FJ0) for details on hiring an employee.

In case employees already exist in the SAP SuccessFactors Employee Central instance at the point in time when Position Management is implemented, these employees can be assigned to the newly created position as appropriate. This is sketched in the Appendix of this document.

 Recommendation

Continue in the process execution with process step 4.2.6 Viewing New Position.

#### Option 2: Requesting Additional Information about Position

Test Administration

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

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

Purpose

In case the position attributes are not correct or incomplete, the member of the HR Administrator dynamic group sends the form back to the line manager and requests him or her to provide the missing information or correct wrong attributes.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the HR Administrator dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Creation Request | In the Approve Requests dialog box, click on the Create Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions,for field Object value Position, and in field Requested By the name of the line manager who requested the position creation. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Create Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the creation request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position that should be created. * In the Comment section, you can post your remarks to the creation request. * On the right part of the screen a short profile of the line manager who requests the position creation is given, as well as administrative details to the workflow activities until now. |  |
| 4 | Review Position Details | Check in the Position section if the attributes of the position are complete and correct. | The attributes of the new position have been reviewed; these are incomplete and/or incorrect. |  |
| 5 | Send Request Back | In case information is missing or is incorrect, send the form back to the requesting line manager. Enter an explaining comment, e.g. specify which data is missing, and choose the Send Backbutton. | The Send Back Request dialog box is displayed, informing you that the request will be sent back to the request initiator (line manager in this case) and he or she will be notified. |  |
| 6 | Confirm your Choice | Choose again the Send Backbutton. | The system generates a success message and you are directed back to your Home page. The workflow has been sent back to the requesting line manager for updating it.   Note  In case you have sent the request back starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page.  Continue with process steps 4.2.5.2.1 Receiving Additional Information Request and 4.2.5.3 Updating Position Creation Request. Afterwards, the Headcount Approver and HR Administrator dynamic groups need to process the request again. |  |

##### Option 2 (continued): Receiving Additional Information Request

Purpose

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

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

#### Option 2 (continued): Updating Position Creation Request

Test Administration

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

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

Purpose

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

Procedure

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Go to your e-mail inbox and search the e-mail from the member of the HR Administrator dynamic group who has requested for more information.  Note  The subject of this email states something like “The Create Position action for <position title> has been sent back by <HR administrator name>.”  Open this e-mail and choose the available hyperlink. You are directed to the Employee Central login screen, where you need to enter your password (your username is already filled by default). | Alternatively, you can log on to Employee Central, go on the Home page to theTo Dosection and click on the Approve Requests tile. In the upcoming Approve Requests dialog box, click on the Create Position link next to Name: <position title>. | You are directed to the Employee Files > Workflow Details page containing details to the request. |  |
| 2 | Update Request | To add the missing or correct the wrong position attributes, select the Update link at the bottom of the page. |  | The fields in the Position: <position title (code)> section of the request become editable. |  |
| 3 | Provide Missing Details | Provide the missing attributes, or correct the wrong ones, as per the comment written by the member of the HR Administrator dynamic group in his or her rejection. |  |  |  |
| 4 | Resubmit Request | Choose the Resubmit button. |  | The Please confirm your request dialog box displays on the screen. |  |
| 5 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |  |
| 6 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  | The Headcount Approver dynamic group and the HR Administrator dynamic group are shown as approvers. |  |
| 7 | Confirm Workflow | Select the Confirm button. |  | The position creation request has been resubmitted. You are directed back to your Home page.  A new approval process is triggered, and a member of each of the Headcount Approver and HR Administrator dynamic groups needs to approve the request.  Note  To follow the new loop in the approval process, continue as described in process step 4.2.4 Processing Position Creation Request and subsequent. |  |

### Viewing New Position

Test Administration

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

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

Purpose

The Line Manager views if the new position has been created as expected. For this, he or she uses the Position Organization Chart.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Line Manager. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Go to Position Org Chart | Go to the Position Org Chart tab. | The position hierarchy as of today starting with your position and containing one level below is displayed.  In case the newly created position is more than one level below your position, continue with test step # 4 and subsequent.  In case the newly created position is one level below your position, continue directly with test step # 5. |  |
| 4 | Search Position (Optional) | In case the newly created position is more than one level below your position, select in the Search By field value Positions from the drop-down. In the Search field, select the newly created position from the drop-down.  Click on the calendar icon  located in the top right corner of the screen and select from the calendar help the date the position becomes effective, or any date after this date. | The selected position is displayed. Continue with test step # 5. |  |
| 5 | Go to Detailed Position Data | Click on the position and in the upcoming side panel click on the Show Position icon.  Note  This icon is located below the <position title (code)>, next to as of <selected date>. | The Position: <position title (code)> window shows up containing the position details. |  |
| 6 | Verify Position Attributes | Verify if the position attributes are as expected. |  |  |
| 7 | Close Window | When done, choose X (Cancel). |  |  |
| 8 | Verify Position Hierarchy (Optional) | In case the newly created position is more than one level below your position, (meaning you had to execute test step # 4, too), choose the Up One Level button to navigate up in the hierarchy. |  |  |

### Creating Positions by Copying (Optional)

Test Administration

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

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

Purpose

In case, several new positions are needed that have the same or similar attributes as another position, this position can be taken as template for copying and the mass copy function is used.

This function is reserved to the HR Administrator. He or she creates several new positions by copying them from an existing position and possibly adjusting some of the attributes.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search Position | Go to the Position Org Chart tab.  To search for the position that should be used as template for the mass copy, proceed using one of the options below:  Option 1:  In the Search By field, select value Positions from the drop-down.  In the Search field, select the appropriate position from the drop-down.  Click on the calendar icon  located in the top right corner of the screen and select an appropriate date from the calendar help.  Option 2 (possible only if the position used as template has already an incumbent):  In the Search By field, select value People from the drop-down.  In the Search field, enter name or name parts of the employee. Select the appropriate employee from the list of suggested persons.  Click on the calendar icon  located in the top right corner of the screen and select an appropriate date from the calendar help. | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. For each position, visible in the org chart, following details are shown:   * (Position) Code * (Position) Title * Job Title * Details about the organization to which the position belongs to * Number of current / target FTEs * Current incumbent, if existing   For the lower-level positions (if existing) the number of subordinated positions, and/or subordinated matrix positions, if any, is displayed. |  |
| 4 | Choose Position as Template for Copies | Click on the position you want to use as template for copies. In the upcoming side panel, next to the position choose the Show Menu  icon, and in the upcoming small callout choose the option Copy Position. | The Copy Position dialog box shows up informing you that the position will be copied with its attributes and that all copies will have the same parent position. |  |
| 5 | Start Copying | In the Number of positions to copy field enter the number of copies of the selected position you want to perform.  Flag the Set To Be Hired checkbox (if not already flagged by default) and choose the OK button. | The SuccessFactors: Position Org Chart dialog box shows up containing the list with codes of the newly created positions. The newly created positions will have the same characteristics as the position from which you copied them and are visible in the position org chart. |  |
| 6 | Adapt Copied Positions (Optional) | In case some attributes of the positions created by copying are needed, change them. For this, proceed as described in chapter 4.3 Position Update. | Some of the attributes of the newly created positions have been adjusted. |  |

Note

The following sequence of sub-processes (Position Update, Position Deactivation, and Mass Changes for Positions) is a logical one; the sub-processes can be performed in any meaningful sequence.

## Position Update (Sub-Process)

 Recommendation

For ease of consumption of the documentation within this chapter, it is recommended to check in parallel the process flow sketched in the appropriate process diagram FK1\_SFHCM1802\_Process\_Overview\_EN\_XX.pptx.

### Requesting Position Update

Test Administration

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

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

Purpose

Attributes of a position need to be always up-to-date with business requirements. Situations can occur in which this is not the case anymore, therefore the attributes need to be adapted. These changes can refer to correcting errors made during record creation, or to effective dated changes that become valid starting a particular date in case of reorganizations required within the company or position updates.

The Line Manager (called Supervisor in the Employee Central system), in whose area of responsibility the position resides, raises a position update request to the HR Administrator dynamic group. He or she will be able to request effective dated changes that become valid starting a particular date. To request a position update, the line manager uses the Position Organization Chart.

In case the position, which should be updated, has already an incumbent, it might make sense to keep common fields between position and job information in-sync, such that changes made to the position will be visible in the job information of the incumbent (employee). The Line Manager will be asked for his/her decision on that while requesting the position update.

As examples in this document, we consider following use-cases:

* Effective dated position change
* Forward propagation

Each change in the position attributes triggers a workflow item, which needs to be approved by a member of the HR Administrator dynamic group. In the following, we consider that the requesting line manager performs updates to several positions and only afterwards, the requests are approved.

 Note

The HR Administrator can correct errors made during record creation or trigger effective dated changes due to reorganizations. These position updates executed by the HR Administrator do not require an approval of a member of the HR Administrator dynamic group; instead, the changes are saved immediately.

Following use cases are shortly described at the end of this chapter:

* Correction of position details
* Change of the higher-level position of a position

 Caution

If two users are editing a position at the same time, it becomes a case of “first change wins”. That is, changes which are saved first by one of the users will be applied. The second user will receive an error message. Depending on the type of position update executed, different error messages are issued:

* If the change of the first user triggered a workflow, the second user receives an error message informing that a workflow is pending for this position record. Unless the workflow is processed and the changes become effective in the system, the second user cannot perform any updates to this position.
* If the change of the first user is immediately saved without triggering a workflow, the second user receives an error message informing that the changes he or she made for the position data conflict with those made by another user. He or she is asked to refresh and resubmit his or her changes.

In both cases, the second user needs to acknowledge this error message by clicking the OK button on the Error dialog box.

This restriction is called optimistic locking, and ensures that no conflicting changes can be made at the same time to the same position.

 Note

The administrative super user can also do the change in data via the administration center. This is shortly described below the Procedure table. Be aware though that in this case, changes to positions with incumbent will not be taken over to the job information of that incumbent!

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 a Line Manager. |  | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. |  | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. The directly subordinated employees are also shown. |  |
| 3 | Search Position | Go to the Position Org Chart tab.  To search for the position that is to be changed, proceed using one of the detailed options: | Option 1:  In the Search By field, select value Positions from the drop-down.  In the Search field, select the appropriate position from the drop-down.  Click on the calendar icon  located in the top right corner of the screen and select an appropriate date from the calendar help. | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. For each position, visible in the org chart, following details are shown:   * (Position) Code * (Position) Title * Job Title * Details about the organization to which the position belongs to * Number of current / target FTEs * Current incumbent, if existing   For the lower-level positions (if existing) the number of subordinated positions, and/or subordinated matrix positions, if any, is displayed. |  |
| Option 2 (possible only if the position has already an incumbent):  In the Search By field, select value People from the drop-down.  In the Search field, enter name or name parts of the employee. Select the appropriate employee from the list of suggested persons.  Click on the calendar icon  located in the top right corner of the screen and select an appropriate date from the calendar help. |  |
| 4 | View Position Details | Click on the appropriate position. In the upcoming side panel, next to the position, choose the Show Position  icon located below <position title (code)> and next to as of <selected date>. |  | The Position: <position title (code)> window shows up containing the position details.  Continue with one or several of the use cases detailed below, as per your requirement. |  |

Use case 1: effective dated position change

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- | --- |
| 5 | Go to Edit Mode | In the Position: <position title (code)> window select the Edit link. |  |  | The Insert new changes for Position: <position title (code)> dialog box is displayed. |  |
| 6 | Add Effective Dated Position Change | In the Insert new changes for Position: <position title (code)> dialog box, enter the date the change becomes effective and choose the Proceed button. | Enter Effective Date for this change: select date from calendar help, for example today’s date (defaulted value) or future date |  | The Position: <position title (code)> dialog box is displayed, containing the fields in edit mode. |  |
| 7 | Change Position Details | Make changes as appropriate. | Adapt values as per the requirements, for example Business Unit, Department, or Division. |  | . |  |
| 8 | Save Data | Choose the Save button to save the record. |  | In case the position has already an incumbent, a Synchronize Incumbents dialog box is displayed, in which you are asked if you want to synchronize the position data with the job information data of the incumbent. Proceed as per your requirement, for example choose Yes. | The Please confirm your request dialog box displays on the screen.  Note  In case the position has an incumbent and you have chosen to synchronize the position data with the job information data of the incumbent, the comment text field contains this information. |  |
| 9 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  |  | The HR Administrator dynamic group is shown as approver. |  |
| 10 | Confirm Workflow | Select the Confirm button. |  |  | In the Position: <position title (code)> dialog box, the message This is non-actionable(to be approved) record is displayed and the old values are strikethrough. The workflow has been sent to the next processor, namely the HR Administrator dynamic group. |  |
| 11 | Close Window | On the Position: <position title (code)> dialog box, choose X (Cancel). |  |  | You are directed back to the Position Org Chart screen. Note that the updates requested by you are not yet visible for the position in the Position Org Chart.  Continue in the process execution with process step 4.3.2 Processing Position Update Request. |  |

Use case 2: forward propagation

Forward propagation of future records means that a change in the value of a field in the Position is also made (“propagated”) to future records for the same Position. The forward propagation of this field change stops as soon as one of the future records has a field value maintained that is different than the original field value.

 Note

This use case can be executed in a sequential order: the line manager requests a position update for a specified date in the future; a member of the HR Administrator dynamic group processes the request, and in case the request is approved, the change becomes effective in the system starting the requested date. Then the line manager requests another position update for a specified date in the future, which lies before the date of the first request; the update request includes also changes to fields that have been changed already in the first request. A member of the HR Administrator dynamic group processes this second request, and in case the request is approved the change becomes effective in the system starting the requested date.

For sake of simplicity and in order not to overload the document, we consider that the line manager executes in the same process step both update requests, which are then processed by a member of the HR Administrator dynamic group.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- | --- |
| 5 | Go to Edit Mode | In the Position: <position title (code)> window select the Edit link. |  |  | The Insert new changes for Position: <position title (code)> dialog box is displayed. |  |
| 6 | Add Future Dated Position Change | In the Insert new changes for Position: <position title (code)> dialog box, enter the date the change becomes effective and choose the Proceed button. | Enter Effective Date for this change: select future date from calendar help, for example 06/01/2018 |  | The Position: <position title (code)> dialog box is displayed, containing the fields in edit mode. |  |
| 7 | Change Position Details | Make changes as appropriate, for example change the pay grade. | Pay Grade: adapt as appropriate |  |  |  |
| 8 | Save Data | Choose the Save button to save the record. |  | In case the position has already an incumbent, a Synchronize Incumbents dialog box is displayed, in which you are asked if you want to synchronize the position data with the job information data of the incumbent. Proceed as per your requirement, for example choose Yes. | The Please confirm your request dialog box displays on the screen.  Note  In case the position has an incumbent and you have chosen to synchronize the position data with the job information data of the incumbent, the comment text field contains this information. |  |
| 9 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  |  | The HR Administrator dynamic group is shown as approver. |  |
| 10 | Confirm Workflow | Select the Confirm button. |  |  | In the Position: <position title (code)> dialog box, the message This is non-actionable(to be approved)record is displayed and the old values are strikethrough. The workflow has been sent to the next processor, namely the HR Administrator dynamic group. |  |
| 11 | Close Window | On the Position: <position title (code)> dialog box, choose X (Cancel). |  |  | You are directed back to the Position Org Chart screen. Note that the updates requested by you are not yet visible for the position in the Position Org Chart. |  |
| 12 | Add Another Future Dated Change for Same Position | In case you realize that an additional change is needed to the same position which should take place in advance of the future change you just maintained in test steps # 6 to # 11, proceed as follows:  Click on the position. In the upcoming side panel, next to the position, choose the Show Position  icon located below <position title (code)> and next to as of <selected date>.  In the upcoming Position: <position title (code)> window select the Edit link. In the Insert new changes for Position: <position title (code)> dialog box, enter a date between the creation date of the position and the date chosen in test step # 6, and choose the Proceed button. | Enter Effective Date for this change: select future date from calendar help, for example 05/01/2018 |  |  |  |
| 13 | Change Position Details | Make changes as appropriate, for example change the pay grade and organizational details of the position. | Pay Grade: select from drop-down, other than selected in test step # 7 |  |  |  |
| Adapt values in other fields as per the requirements, for example Department, Location, and Cost Center. |  |  |
| 14 | Save Data | Choose the Save button to save the record. |  | In case the position has already an incumbent, a Synchronize Incumbents dialog box is displayed, in which you are asked if you want to synchronize the position data with the job information data of the incumbent. Proceed as per your requirement, for example choose Yes. | The Please confirm your request dialog box displays on the screen.  Note  In case the position has an incumbent and you have chosen to synchronize the position data with the job information data of the incumbent, the comment text field contains this information. |  |
| 15 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. |  |  | The HR Administrator dynamic group is shown as approver. |  |
| 16 | Confirm Workflow | Select the Confirm button. |  |  | In the Position: <position title (code)> dialog box, the message This is non-actionable(to be approved)record is displayed and the old values are strikethrough. The workflow has been sent to the next processor, namely the HR Administrator dynamic group. |  |
| 17 | Close Window | On the Position: <position title (code)> dialog box, choose X (Cancel). |  |  | You are directed back to the Position Org Chart screen.  Continue in the process execution with process step 4.3.2 Processing Position Update Request. |  |

Note

As mentioned in the Purpose section of this chapter, the HR Administrator can perform corrections of position attributes if these have been maintained erroneously. In addition, he or she can change the higher-level position of a position, if required by business circumstances. These position updates do not require an approval of a member of the HR Administrator dynamic group; instead, the changes are saved immediately.

In the following, such use-cases are described:

Use case 3: correction of position details if some of them have been maintained erroneously

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| 1 | Select Position to be Corrected | Log on to Employee Central as HR Administrator, navigate to Company Info → Position Org Chart tab and search for the position to be corrected.  Click on the position and in the upcoming side panel next it, 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. |  |
| 2 | Go to Maintenance Mode | In the Position: <position title (code)> window select the Manage link. |  | You are directed to the Manage Data screen, which contains the Position: <position title (code)> portlet. |  |
| 3 | Correct Position Details | In the History portlet on the left of the Manage Data screen, select next to the record you want to correct Take Actions → Make Correction.  Change position details like title, job code, company, business unit, higher-level position etc. | When you change the Job Code, following fields will be updated automatically from the value you have chosen: Job Title, Job Level, Regular/Temporary, and Pay Grade. |  |  |
| 4 | Save Data | Choose the Save button to save the record. |  | The position data record has been corrected. |  |
| 5 | Go Back | Select the Back to: Previous link on top of the Manage Data screen. |  | You are directed back to the Position Org Chart screen. |  |

Use case 4: change of the higher-level position of a position

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Select Position | Log on to Employee Central as HR Administrator, navigate to Company Info → Position Org Chart tab and search for the position to be updated.  Click on the position and in the upcoming side panel next it, 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. |  |
| 2 | Go to Edit Mode | In the Position: <position title (code)> window select the Edit link.  Note  Alternatively, you can select in the Position: <position title (code)> window the Manage link and on the upcoming Manage Data screen select the Insert New Record link on the top right of the Position: <position title (code)> portlet. |  | The Insert new changes for Position: <position title (code)> dialog box is displayed. |  |
| 3 | Add Future Dated Position Change | In the Insert new changes for Position: <position title (code)> dialog box, enter the date the change becomes effective and choose the Proceed button. | Enter Effective Date for this change: select date from calendar help, for example today’s date (defaulted value) or future date | The Position: <position title (code)> dialog box is displayed, containing the fields in edit mode. |  |
| 4 | Change Higher-Level Position | Change the position’s higher-level position. | Higher-Level Position: select from drop-down |  |  |
| 5 | Save Data | Choose the Save button to save the record. |  | The position details have been updated. The change is visible in the Position: <position title (code)> window. The old value is strikethrough. |  |
| 6 | Close Window | On the Position: <position title (code)> dialog box, choose X (Cancel). |  | You are directed back to the Position Org Chart screen, containing the position you just have updated. |  |
| 7 | View New Position Hierarchy | On the Position Org Chart screen select from the calendar help a date equal or higher to the date the change in the position hierarchy becomes effective. Choose the Up One Level button. |  | The position is placed below the new higher-level position chosen in test step # 4. |  |

Note

If you have the permissions of an administrative super user assigned, you can change the details of a position without incumbent yet also by using the administration tools. For this, proceed as follows:

* Log on to Employee Central as an Administrative Super User and from the Home drop-down select Admin Center.
* In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Data.
* In the Search field select Position from the drop-down, search for an existing position, and view its details.
* Continue as described in the above Procedure table starting with test step # 5.

 Caution

Be aware that, in case the position has already an incumbent, the update of position is not reflected as change in the job information of that incumbent!

Note

in case the Company Structure Overview module has been implemented in the Employee Central instance using the SAP Best Practices, the position update can be requested also from the Company Structure Overview. The Company Structure Overview also uses the MDF Quick Card for positions and respects the Configuration UI. When position updates are started from the company structure overview, then in case the position has already an incumbent, the implemented propagation rule Position to Job Info Synchronization is triggered exactly alike in the position org chart. In the assumption that you have the right permissions, you can request the position update starting from the company structure overview as follows:

* Log on to Employee Central as a Line Manager. From the Home drop-down select Company Info and go to the Company Structure Overview tab.
* Select the <company structure definition name> as defined during configuration. Using the two Search fields, select for example the department to which the position you want to update belongs to.
* Click on the <#> positions are assigned icon to expand the Positions menu in the side panel of the selected department. The positions are listed in alphabetical order.
* Search for the position using the free text Search field.
* Select the Show Position  icon next to the position’s name to open the Position: <position title (code)> window.
* Select the Edit link and proceed as described in the Procedure table of use case 1 or use case 2, starting with test step # 6.

#### Receiving Position Update Request Notification

Purpose

It is assumed that email is configured and the email addresses of all employees are maintained in the system. Under this assumption, the members of the HR Administrator dynamic group have received an email notification informing them that the Line Manager has submitted a position update request.

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

### Processing Position Update Request

Purpose

The workflow item containing the position update request has been sent to the HR Administrator dynamic group for further processing. One of the members of the HR Administrator dynamic group picks up the workflow item and checks the position attributes maintained in the request.

In case submitted changes in the position attributes are complete and correct, the member of the HR Administrator dynamic group approves the position update in the system. In this case, the changes of the position attributes become effective in the system.

In case the submitted changes in the position attributes are incomplete or not correct, the member of the HR Administrator dynamic group sends the form back to the requesting manager. He or she needs to update the request and resubmit it again for approval by the HR Administrator dynamic group.

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

#### Option 1: Approving Position Update Request

Test Administration

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

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

Purpose

A member of the HR Administrator dynamic group needs to approve the position update request, in order for the changes in the position attributes to take effect in the system. Until the update request is approved, the proposed changes are pending and are not visible in the Position Org Chart.

In this process step, a member of the HR Administrator dynamic group will need to complete the workflow by selecting the update request, reviewing the changed position attributes and then lastly approving the request.

 Note

In the following procedure description, it is considered that several position updates requested by the line manager are visible in the To Dosection of the member of the HR Administrator dynamic group.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the HR Administrator dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the Change Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions,for field Object value Position, and in field Requested By the name of the line manager who requested the position update. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Change Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the change request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position updates. * In the Comment section, you can post your remarks, if you consider appropriate. * On the right part of the screen a short profile of the line manager who requests the position update is given, as well as administrative details to the request initiation. |  |
| 4 | Review Position Details | Review the details in the Position section. | The submitted changes in the position attributes are complete and correct. |  |
| 5 | Approve Request | Choose the Approvebutton to approve the position update request. | The system generates a message about the successful approval of the workflow request. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1.  The updates of the position attributes become effective the date as entered in the system and can be viewed by the Line Manager in the Position Organization Chart. |  |
| 6 | Approve Another Change Request | Approve other position update requests submitted by the same line manager. For this, proceed as described in test steps # 3 to # 5.   Note  Once there is no request left for you to approve, the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |  |

Result

The position has been updated in the system as per the business requirements provided by the line manager in whose area of responsibility the position is. The line manager has received automatic email notifications that the position updates he or she has requested have been approved.

Depending if the changed position has already an incumbent or not, continue the testing of this scope item as follows:

* If the updated position has an incumbent and the requesting manager has decided to synchronize the position data with the job information data of the incumbent (by selecting Yes in the Synchronize Incumbents dialog box in process step 4.3.1 Requesting Position Update), the line manager receives an automatic email notification about a workflow item needing his or her attention. Continue with process step 4.3.2.2 Approving Employee Job Information Update and subsequent.
* If the updated position has no incumbent, or the requesting manager has decided to not synchronize the position data with the job information data of the incumbent (by selecting No in the Synchronize Incumbents dialog box in process step 4.3.1 Requesting Position Update), skip the subsequent process steps and continue directly with process step 4.3.3 Viewing Updated Position and subsequent.

#### Option 1 (continued): Approving Employee Job Information Update (Optional)

Test Administration

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

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

Purpose

 Caution

This process step is relevant only if the changed position has an incumbent and user decision has been taken to synchronize position data with job information data!

In case the position has already an incumbent, it might make sense to keep common fields between position and job information in-sync, such that changes made to the position will be visible in the job information of the incumbent (employee). This can be achieved by implementing a propagation rule, to specify which common fields between the Position object and the jobInfo employment object are synchronized when changes are made in the Position object. This rule is triggered for backend synchronization whenever a position with incumbents is changed. The common fields of position and job information are synchronized. For more details on defining such a business rule, you can refer to the Position Management workbook.

In case the line manager has decided to synchronize position data with job information data (by selecting Yes in the Synchronize Incumbents dialog box in process step 4.3.1 Requesting Position Update), he or she needs to approve the update in the job information of the position incumbent once the position update request has been approved by a member of the HR Administrator dynamic group.

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

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Line Manager. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the Approve Position Data Update for <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. In the list, click on the appropriate Approve Position Data Update for <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the change request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * Depending which job information details will change due to the changes induced to the position of the employee, the Organizational Information and/or Job Information sections are visible, containing details to these changes, * In the Comment section, you can post your remarks, if you consider appropriate. * On the right part of the screen a short profile of the employee for whom the change is requested is given. In addition, you are informed that in case you decline the request, the job information of the employee will differ from the position data. |  |
| 4 | Approve Request | Choose the Approvebutton to approve the job information update for the employee. | The system generates a message about the successful saving of the data. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page.  The change in job information becomes effective the date as entered in the system and can be viewed by the HR Administrator. |  |

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

Purpose

**Only if the changed position has already an incumbent, user decision has been taken to synchronize position data with job information data, and the Line Manager has approved the job information update of the employee:** Under the assumption that email is maintained for all employees in the system, an email is sent out to the incumbent of the position, notifying him or her about changes in the job information resulted from the data change of the position. This email is sent out automatically once the line manager has approved the job information change of the employee and the data has been successfully saved.

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

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

Purpose

**Only if the changed position has already an incumbent, user decision has been taken to synchronize position data with job information data, and the Line Manager has approved the job information update of the employee:** The incumbent of the position has received a notification about changes in his or her job information induced by changes to the position, to which he or she is assigned.

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

#### Option 1 (continued): Viewing Employee Job Information Details (Optional)

Test Administration

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

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

Purpose

 Caution

This process step is relevant only if the changed position has an incumbent and user decision has been taken to synchronize position data with job information data!

The HR Administrator views if the job information of the employee has been updated based on the implemented propagation rule Position to Job Info Synchronization upon changes to the position data have been performed.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator. | The Home page is displayed. |  |
| 2 | 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 an employee whose job information has been updated as result of the change in position data. | 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 | Go to Employment Information | On the Employee Files screen, go to the Employment Information section. | The Employment Information section is displayed. |  |
| 5 | View Job Information Details | In the Job Information block of the Job Information subsection verify that the changed position data is reflected in the employee’s job information. Proceed as follows:  For use cases 1 and 2 of process step 4.3.1 Requesting Position Update, select the Clock (History) icon next to the Job Information block. In the Job Information Changes dialog box verify that the change in position data is classified as a Position Change event with event reason Position Data Update (POSUPD).  In case the higher-level position of a position with incumbent has been changed (use case 4 described at the end of process step 4.3.1 Requesting Position Update), the line manager of all employees assigned to the changed position is changed. In this case, check in the Job Information block the Supervisor field, to see if he or she has changed as expected, or if the field is empty in case there is no line manager anymore. In the History (Clock icon) of the job information, the change in supervisor (line manager) is classified as a Transfer event. | Continue in the process execution with process step 4.3.3 Viewing Updated Position. |  |

#### Option 2: Sending Back Position Update Request for Correction

Test Administration

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

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

Purpose

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

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a member of the HR Administrator dynamic group. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Change Request | In the Approve Requests dialog box, click on the Change Position link next to Name: <position title>.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to process. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions,for field Object value Position, and in field Requested By the name of the line manager who requested the position update. Then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Change Position link, located next to the appropriate Name: <position title>. | The Employee Files > Workflow Details screen is displayed containing details to the change request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Position section contains details to the position updates. * In the Comment section, you can post your remarks, if you consider appropriate. * On the right part of the screen a short profile of the line manager who requests the position update is given, as well as administrative details to the request initiation. |  |
| 4 | Review Position Details | Review the details in the Position section. | The requested updates to the existing position have been reviewed. The submitted changes in position attributes are incomplete and/or incorrect. |  |
| 5 | Send Request Back | In case information is missing or is incorrect, send the form back to the requesting line manager. Enter an explaining comment, e.g. specify which data is missing, and choose the Send Backbutton. | The Send Back Request dialog box is displayed, informing you that the request will be sent back to the request initiator (line manager in this case) and he or she will be notified. |  |
| 6 | Confirm your Choice | Choose again the Send Backbutton. | The system generates a success message and you are directed back to your Home page. The workflow has been sent back to the requesting line manager for updating it.   Note  In case you have sent the request back starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1.  Continue with process steps 4.3.2.4.1 Receiving Correction Request for Position Update and 4.3.2.5. Adapting Position Update Request. Afterwards, a member of the HR Administrator dynamic group needs to process the request again. |  |
| 7 | Send Other Update Requests Back (Optional) | If appropriate, send back other position update requests submitted by the same line manager. For this, proceed as described in test steps # 3 to # 6.   Note  Once there is no request left for you to approve, the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |  |

##### Option 2 (continued): Receiving Correction Request for Position Update

Purpose

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

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

#### Option 2 (continued): Adapting Position Update Request

Test Administration

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

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

Purpose

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

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Go to your e-mail inbox and search the e-mail from the member of the HR Administrator dynamic group who has requested for more information.  Note  The subject of this email states something like “The Insert Position action for <position title> has been sent back by <HR administrator name>.”  Open this e-mail and choose the available hyperlink. You are directed to the Employee Central login screen, where you need to enter your password (your username is already filled by default).  Note  Alternatively, you can log on to Employee Central, go on the Home page to theTo Dosection and click on the Approve Requests tile. In the upcoming Approve Requests dialog box, click on the Change Position link next to Name: <position title>. | You are directed to the Employee Files page containing details to the request. |  |
| 2 | Update Request | To add the missing or correct the wrong position attributes, select the Update link at the bottom of the page. | The fields in the Position: <position title (code)> section of the request become editable. |  |
| 3 | Provide Missing Details | Provide the missing attributes, or correct the wrong ones, as per the comment written by the member of the HR Administrator dynamic group in his or her rejection. |  |  |
| 4 | Resubmit Request | Choose the Resubmit button. | The Please confirm your request dialog box displays on the screen. |  |
| 5 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request. |  |  |
| 6 | Check Approvers | In the dialog box, select the View Workflow Participants link to verify the approvers of the request. | The HR Administrator dynamic group is shown as approver. |  |
| 7 | Confirm Workflow | Select the Confirm button. | The position update request has been resubmitted. You are directed back to your Home page.  A new approval process is triggered, and a member of the HR Administrator dynamic group needs to approve the request.  Note  To follow the new loop in the approval process, continue as described in process step 4.3.2 Processing Position Update Request and subsequent. |  |

### Viewing Updated Position

Test Administration

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

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

Purpose

The Line Manager views if the position has been updated as expected. For this, he or she uses the Position Organization Chart.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Line Manager. | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Go to Position Org Chart | Go to the Position Org Chart tab. | The position hierarchy as of today starting with your position and containing one level below is displayed. |  |
| 4 | Search Position | In the Search By field, select value Positions from the drop-down. In the Search field, select the updated position from the drop-down.  Click on the calendar icon  located in the top right corner of the screen and select from calendar help the date the changes of the position attributes become effective, or any date after this date.   Recommendation  In case you have requested a forward propagation of position attributes (use case 2 in process step 4.3.1 Requesting Position Update), select a date that lies between the two effective change dates. In this case, you will be able to see both changes in the position history: one as last change, one as next change. | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 5 | Go to Position History | Click on the position and in the upcoming side panel click on Position History. | The menu is expanded and changes in course of time to the position are shown. Most likely, you will see up to three links: Position effective, Last change, and Next change. |  |
| 6 | Verify Position Attributes | Verify if the position attributes are updated as expected.  For this, choose in the Position History the Show Position  icon located next to each link mentioned in test step # 5.  In case you have requested a forward propagation of position attributes (use case 2 in process step 4.3.1 Requesting Position Update), do the following:   * Verify that the Pay Grade value valid from 05/01/2018 has been delimited on 04/30/2018. * Check that the changes made to Department, Location, and Cost Center on 05/01/2018 have been propagated to the record having start date 06/01/2018. * The Pay Grade value from 05/01/2018 has not been propagated to the record having start date 06/01/2018, as the system found a change was already scheduled for that date. |  |  |
| 7 | Close Window | When done, choose X (Cancel). |  |  |

Note

An HR Administrator with appropriate permissions will be able to view the complete history of a position. For this, proceed as follows:

* Log on as HR Administrator, navigate to Company Info → Position Org Chart tab and search for the position.
* Click on the position. In the upcoming side panel, next to the position, choose the Show Position  icon located below <position title (code)> and next to as of <selected date>.
* In the upcoming Position: <position title (code)> window select the Manage link. You are directed to the Manage Data screen, which contains on the right side the Position: <position title (code)> portlet, and on the left side the History of this position. All changes made to the position record are visible in the History area. Depending on the date chosen, history will show that changes might have been scheduled to take effect in the future.

## Position Deactivation (Sub-Process)

### Requesting Position Deactivation (process step outside software)

Purpose

When a position becomes obsolete, for example due to a corporate downsizing, or due to changes in business requirements, this position needs to be deactivated in the system. The Line Manager (called Supervisor in the Employee Central system), in whose area of responsibility this position resides, raises a position deactivation request to the HR Administrator. This can be done for example via an email, or a phone call.

### Receiving Position Deactivation Request (process step outside software)

Purpose

The HR Administrator has received the position deactivation request from the Line Manager.

### Deactivating Position

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 changes the validity period of the position, so that the end date occurs sooner than stated.

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

Prerequisites

No incumbent is assigned to the position starting one day after the deactivation date. Before deactivating a position, make sure that the incumbent(s) has been assigned to another position or has been terminated.

The position has no active lower-level positions.

The position is to be excluded from reporting activities.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Administrator. |  | The Home page is displayed. |  |
| 2 | Go to Company Info | From the Home drop-down, select Company Info. |  | The Company Info screen is displayed containing by default the Org Chart based on the logged-in user. |  |
| 3 | Search Position | Go to the Position Org Chart tab.  To search for the position that is to be deactivated, proceed as follows: | In the Search By field, select value Positions from the drop-down.  In the Search field, select the appropriate position from the drop-down.  Click on the calendar icon  located in the top right corner of the screen and select an appropriate date from the calendar help. | The position is displayed graphically and following details are shown:   * (Position) Code * (Position) Title * Job Title * Details about the organization to which the position belongs to * Number of current / target FTEs    Caution  Number of current FTE should be 0! |  |
| 4 | View Position Details | Click on the position. In the upcoming side panel, next to the position, choose the Show Position  icon located below <position title (code)> and next to as of <selected date>. |  | The Position: <position title (code)> window shows up containing the position details. |  |
| 5 | Go to Edit Mode | In the Position: <position title (code)> window select the Edit link. | Alternatively, you can select in the Position: <position title (code)> window the Manage link and on the upcoming Manage Data screen select the Insert New Record link on the top right of the Position: <position title (code)> portlet. | The Insert new changes for Position: <position title (code)> dialog box is displayed. |  |
| 6 | Add Position Deactivation Date | In the Insert new changes for Position: <position title (code)> dialog box, enter the date the deactivation becomes effective and choose the Proceed button. | Enter Effective Date for this change: select first day on which position is inactive | The Position: <position title (code)> dialog box is displayed, containing the fields in edit mode. |  |
| 7 | Deactivate Position | Enter deactivation-relevant details. | Status: select InActive from drop-down |  |  |
| To Be Hired: select No from drop-down |  |  |
| 8 | Save Data | Choose the Save button to save the record. |  | The position has been deactivated (become inactive) starting the date entered for the new record. The changes are visible in the Position: <position title (code)> window. The old values are strikethrough. |  |
| 9 | Close Window | On the Position: <position title (code)> dialog box, choose X (Cancel). |  | You are directed back to the Position Org Chart screen. |  |
| 10 | Search Deactivated Position | Search for the deactivated position as described in test step # 3 for a date after the date chosen in test step # 6. |  | The position is no longer available in the result list starting the date it has been set to inactive. |  |

Note

In case you want to view the history of the deactivated position, proceed as follows:

* On the Position Org Chart search for the position as described in test step # 3.
* Click on the position. In the upcoming side panel, next to the position, choose the Show Position  icon located below <position title (code)> and next to as of <selected date>.
* In the upcoming Position: <position title (code)> window select the Manage link. You are directed to the Manage Data screen, which contains on the right side the Position: <position title (code)> portlet, and on the left side the History of this position. All changes made to the position record are visible in the History area. Depending on the date chosen, history will show that changes might have been scheduled to take effect in the future.

### Notifying Line Manager about Position Deactivation Completion (process step outside software)

Purpose

After the position has been deactivated, the HR Administrator notifies the Line Manager about the completion of the position deactivation request. This can be done for example via an email, or a phone call.

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

Purpose

The Line Manager has received the notification from the HR Administrator that the position has been deactivated.

## Mass Changes for Positions (Sub-Process)

The mass change feature can be used to update simultaneously a large number of dedicated positions with new attribute values from a specified effective date. It is also possible to propagate the changes to the incumbents of the positions.

 Caution

Only the administrative super users are allowed to manage mass changes for positions!

### Requesting Position Mass Change (process step outside software)

Purpose

The Organizational Design Expert requests a change to the organizational structure, namely a mass change of specific existing positions. As mass changes are reserved to administrative super users only, the Organizational Design Expert provides to the administrative super user the required details for the position mass change, for example, the change in job title of specified positions. The request can be done for example via an email, or a phone call.

### Receiving Position Mass Change Request (process step outside software)

Purpose

The Administrative Super User has received the position mass change request from the Organizational Design Expert and can start the process in the system.

### Creating Position Mass Change Rule

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The Administrative Super User sets up a rule for mass change to position attributes. Attribute values that are common to several positions will be replaced simultaneously with other values. As example, we consider the job title of the position, which is an attribute having same value for several positions.

Procedure

Note

For testing purposes, you can also use the business rule described as example in the Position Management workbook.

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Administrative Super User. | The Home page is displayed. |  |
| 2 | Go to Business Rule Configuration | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Company Settings → Configure Business Rules. | The Configure Business Rules screen is displayed. |  |
| 3 | Create New Rule | On the Configure Business Rules screen, select the Create New Rule button. | The New Rule: Select a Scenario screen is displayed. |  |
| 4 | Select Scenario for Rule | On the New Rule: Select a Scenario screen check the Position Management > Update Rule for Mass Change Run radio button. | Rule identification fields to be filled show up on the right part of the screen. |  |
| 5 | Enter Identification Details for Rule | Enter values for Rule Name, Rule ID, Start Date, and optional Description. Then select the Continue button. | You are directed to the <Rule Name (Rule ID)> screen where you can define the business rule content. |  |
| 6 | Enter Business Rule Details | Define the business rule as appropriate by entering the appropriate rule conditions.   Recommendation  As example of how to define a rule, refer to the business rule described in the Position Management workbook. |  |  |
| 7 | Save Rule | When done, choose the Save button. |  |  |

Note

Alternatively, you can search for the business rule CC\_PosMgmt\_MassChange\_PosJobTitleChange, which has been configured as described in the Position Management workbook, and adapt it. You have following options:

* Extend it: for this choose Insert New Record, keep the starting date and proceed as per the instructions on the screen;
* Correct possible errors: for this choose from the History portlet in the left part of the screen Take Action → Make Correction and make the appropriate corrections; or
* Create a new rule by copying the existing one: for this choose from the History portlet in the left part of the screen Take Action → Copy Rule and adapt the rule as per your requirements.

### Creating Position Mass Change Run

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The Administrative Super User creates a mass change run for the mass change rule just created in the previous process step.

Procedure

Note

For testing purposes, you can also use the mass change run described as example in the Position Management workbook.

| 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 Administrative Super User. |  | The Home page is displayed. |  |
| 2 | Go to Mass Change Runs Management | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Mass Changes for Metadata Objects. |  | The Manage Mass Change Runs screen is displayed. |  |
| 3 | Create New Mass Change Run | On the Manage Mass Change Runs screen, select from the Create New drop-down value Mass Change Run. |  | The Mass Change Run screen is displayed. |  |
| 4 | Enter Mass Change Run Details | On the Mass Change Run screen, make the following entries. | Code: <unique mass change run identifier> |  |  |
| Name: <mass change run name> |  |
| Object Type To Be Changed: Position |  |
| Change Date: select effective change date from calendar help |  |
| Synchronize To Incumbents: Yes |  |
| Select And Update Rule: select the rule defined in process step Creating Mass Change Rule |  |
| Execution Mode: No Selection |  |
| 5 | Save Mass Change Run | When done, choose the Save button. |  |  |  |

Note

Alternatively, you can search for the mass change run Job Title Change on Position, which has been configured as described in the Position Management workbook, and adapt it. For this choose Take Action → Make Correction, adapt the Change Date to the date you want to make the changes effective. Also, make sure to select for the Select And Update Rule field the rule defined in process step Creating Mass Change Rule.

### Executing Position Mass Change Simulation Run

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

Before executing the productive mass change of positions, the Administrative Super User simulates a mass change run in order to verify if the outcome would be the expected one. The mass changes are not saved, but you can see the result in the log.

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 Administrative Super User. |  | The Home page is displayed. |  |
| 2 | Go to Mass Change Runs Management | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Mass Changes for Metadata Objects. |  | The Manage Mass Change Runs screen is displayed. |  |
| 3 | Search Mass Change Run | On the Manage Mass Change Runs screen, select from the Search drop-down value Mass Change Run and from the second drop-down the mass change run defined in the previous process step Creating Mass Change Run. |  | The Mass Change Run: <mass change run name> screen is displayed. |  |
| 4 | Update Mass Change Run Details | On the Mass Change Run: <mass change run name> screen choose Take Action → Make Correction and make the following entries. | Change Date: select effective change date from calendar help |  |  |
| Execution Mode: Simulate |  |
| 5 | Save Mass Change Run | When done, choose the Save button. |  | The system triggers a job of type MDF Mass Change Run that will process the change. These changes are not persisted in the system. |  |

### Monitoring Position Mass Change Simulation Run

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After the simulated position mass change run is finished, the Administrative Super User can check the outcome.

Note

In case email is configured, the Administrative Super User will receive a notification after the position mass change simulation run has finished.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Administrative Super User. | The Home page is displayed. |  |
| 2 | Go to Monitor Job | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Monitor Job. | The Monitor Jobs screen is displayed. |  |
| 3 | View Job Status | On Monitor Jobs screen, view the status of the mass change run you have just simulated. Select the Download Status link in the appropriate table column. | The csv file jobResponse is exported. You can choose to open the file or first save and then open it. |  |
| 4 | Review Job Response | Verify the content of the CSV file. Especially check content of columns Status and External Code (which contains the positions that would be affected by a mass change run. | In case the status of all changes is SUCCESS, you can execute the productive mass change run as described in the next chapter.  In case there are errors, correct these and re-simulate the mass change until the status is SUCCESS. Only then, execute the productive mass change run.  Note  In this document, we assume that the mass change simulation is successful from the very first run. |  |
| 5 | Close Job Response | When done, choose the Close button in the CSV file. |  |  |

Note

In case you want to view the log containing information about the executed position mass change simulation run, proceed as follows:

* In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Mass Changes for Metadata Objects
* On the Manage Mass Change Runs screen, select from the Search drop-down value Mass Change Run and from the second drop-down the mass change run for which you ran the simulation.
* In the Log section of the upcoming Mass Change Run: <mass change run name> screen review the number of updated and failed objects/records. Select the Details and in the upcoming Details dialog box select the Detailed Information link to view the CSV field with detailed information about each record.

### Executing Position Mass Change Run

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After a successful simulation of mass changes to the positions, the Administrative Super User executes the productive mass change run.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Administrative Super User. | The Home page is displayed. |  |
| 2 | Go to Business Rule Configuration | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Mass Changes for Metadata Objects. | The Manage Mass Change Runs screen is displayed. |  |
| 3 | Search Mass Change Run | On the Manage Mass Change Runs screen, select from the Search drop-down value Mass Change Run and from the second drop-down the mass change run defined in process step Creating Mass Change Run. | The Mass Change Run: <mass change run name> screen is displayed. |  |
| 4 | Update Mass Change Run Details | On the Mass Change Run: <mass change run name> screen choose Take Action → Make Correction and enter for Execution Mode value Run. |  |  |
| 5 | Save Mass Change Run | When done, choose the Save button. | The system triggers a job of type MDF Mass Change Run that will process the change. |  |

#### Updating Positions

Purpose

The outcome of the job of type MDF Mass Change Run is the update of all the positions which have been relevant for the mass change run.

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

#### Updating Employees Job Information (Optional)

Purpose

**Only if one or several updated positions have incumbents and field Synchronize To Incumbents** **has been set** Yes **in the Position Mass Change Run:** based on the implemented propagation rule, specifying which common fields between the Position object and the jobInfo employment object are synchronized when changes are made in the Position object, the job information of the incumbents (employees) is updated upon the mass change performed on the positions.For more details on defining such a rule, refer to the Position Management workbook.

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

### Monitoring Position Mass Change Run

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After the productive mass change run is finished, the Administrative Super User can monitor if the mass change run was successful.

Note

In case email is configured, the Administrative Super User will receive a notification after the mass change run has finished.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Administrative Super User. | The Home page is displayed. |  |
| 2 | Go to Business Rule Configuration | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Monitor Job. | The Monitor Jobs screen is displayed. |  |
| 3 | View Job Status | On Monitor Jobs screen, view the status of the mass change run you have just run productively. Select the Download Status link in the appropriate table column. | The job response is exported as a CSV file. You can choose to open the file or first save and then open it. |  |
| 4 | Review Job Response | Verify the content of the CSV file. Check especially content of columns Status and Message to see if all changes have been performed successfully. | All changes have been performed as per your expectations and you can view the updated position as described in the next chapter. |  |
| 5 | Close Job Response | When done, choose the Close button in the CSV file. |  |  |

Note

In case you want to view the log containing information about the executed mass change run, proceed as follows:

* In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Manage Mass Changes for Metadata Objects
* On the Manage Mass Change Runs screen, select from the Search drop-down value Mass Change Run and from the second drop-down the mass change run for which you executed the productive run.
* In the Log section of the upcoming Mass Change Run: <mass change run name> screen review the number of updated and failed objects/records. Select the Details and in the upcoming Details dialog box select the Detailed Information link to view the CSV field with detailed information about each record.

### Viewing Positions Updates

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) | Administrative Super User | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After the mass change to positions has been performed (for example job title change), the Administrative Super User can check single positions to see if the update has been performed as expected (meaning, for example, that the new job title becomes effective starting a particular date).

Procedure

There are several options you can check the positions updates. We give a short overview of these in the following.

Option 1: spot checks of single positions

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as Administrative Super User. |  | 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 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 you want to view.  Click on the calendar icon  located in the top right corner of the screen and select from the calendar help the date on which the mass change has become effective (or any other date after that date). | The positions that have been updated can be taken from the CSV file containing the job response (see process step Monitoring Mass Change Run for details). | The position hierarchy starting from the selected position and containing one level below, if existing, is displayed. |  |
| 4 | View Detailed Position Data | To view detailed information of a position, click in the position org chart on that position and in the upcoming side panel next to it choose the Show Position cid:image002.png@01D1BA5C.99F71740 icon.  Note  This icon is located below the <position title (code)>, next to as of <selected date>. |  | The Position: <position title (code)> window shows up containing the position details. |  |
| 5 | Verify Updated Information | Check if the updates in position have been performed as per the business rule you have defined. | In case you have used the business rule CC\_PosMgmt\_MassChange\_PosJobTitleChange described in the Position Management workbook, check that the job title has changed as expected. |  |  |
| 6 | Close Window | When done, choose X (Cancel). |  |  |  |

Note

Alternatively, you can make spot checks also via the administration center, too. For this select Admin Center from the Home drop-down, and in the Company Processes & Cycles portlet go to Employee Files → Manage Data. In the Search field select Position, and in the second search field next to it select a position that has been updated upon the mass change. You are directed to the Position: <Title (Code)> portlet on the right side of the screen, containing the current record of that position. On the left side of the screen the History portlet of that position is displayed, containing the changes performed on that position during its lifetime. Check in the History portlet if the change in job title has been performed as expected on the expected date.

Option 2: check large volume of data

| 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 Administrative Super User. |  | The Home page is displayed. |  |
| 2 | Go to Mass Export Function | From the Home drop-down, select Admin Center. In the Company Processes & Cycles portlet of the Admin Center screen go to Employee Files → Import and Export Data. |  | The Import and Export Data screen is displayed. |  |
| 3 | Select Action to Perform | On Import and Export Data screen, select for field Select the action to perform value Export Data from drop-down. |  | The Export Data portlet is displayed containing the fields to be filled. |  |
| 4 | Enter Export-Relevant Data | In the Export Data portlet make following entries: | Select Generic Object: select Position from drop-down |  |  |
| Include dependencies: select No from drop-down  Note  If you choose Yes, additional fields to be filled are available. |  |
| Include Immutable IDs: select No from drop-down |  |
| Exclude reference objects: select No from drop-down |  |
| Select all data records: select Yes from drop-down |  |
| 5 | Export Data | Choose the Export button |  | A system message is generated informing you about the successful export and providing you with information where to take the exported file, namely to Monitor Job. |  |
| 6 | Go to Monitor Job | Go back to the Admin Center screen and in the Company Processes & Cycles portlet go to Employee Files → Monitor Job. |  | The Monitor Jobs screen is displayed. |  |
| 7 | Download Exported File | On the Monitor Jobs screen, search for the job name Position\_MDFExport\_<export date> and select the Download Status link in the appropriate table column. |  | You can choose to open the CSV file or first save and then open it. |  |
| 8 | Verify Positions Updates | Verify the content of the CSV file. Check especially content of columns Code, US English, Start Date, and Job Title (considered to have changed in our example), to see if all changes have been performed successfully. Note, that the history of positions is also captured; therefore, you can see if the change in job title has been performed on the expected date. |  | The mass changes to positions have been performed as per your expectations. |  |
| 9 | Close CSV File | When done, choose the Close button in the CSV file. |  |  |  |

### Viewing Employee Job Information Details (Optional)

Test Administration

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

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

Purpose

 Caution

This process step is relevant only if one or several updated positions have incumbents and Synchronize To Incumbents has been set Yes in the Position Mass Change Run!

In case none of the updated positions has incumbents, you may ignore this chapter!

The Administrative Super User makes spot checks of employees who are assigned to positions that have been updated after the mass change run. He or she views if their job information has been updated as well based on the implemented propagation rule Position to Job Info Synchronization.

Procedure

| Test Step # | Test Step Name | Instruction | Additional Information | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Administrative Super User. |  | 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 an employee whose job information has been updated as result of the position mass change run. |  | 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 | Go to Employment Information | On the Employee Files screen, go to the Employment Information section. |  | The Employment Information section is displayed. |  |
| 5 | View Job Information Details | In the Job Information block verify that the date mentioned in Effective as of <mm/dd/yy> (visible directly below Job Information) coincides with the date the mass change run was effective. Verify if the updates in job information have been performed as per the business rule you have defined. | In case you have used the business rule CC\_PosMgmt\_MassChange\_PosJobTitleChange described in the Position Management workbook, check that the job title in the Job Information block of the Job Information subsection has changed as expected. |  |  |

### Notifying Employees about Job Information Change (Optional) (process step outside software)

Purpose

**Only if one or several updated positions have incumbents and field Synchronize To Incumbents has been set** Yes **in the Position Mass Change Run:** the Administrative Super User notifies the employees about changes in their job information resulted from the mass changes on the positions to which they are assigned. This can be done for example via an email, or a phone call.

### Notifying Organizational Design Expert about Position Mass Change Completion (process step outside software)

Purpose

After the position mass change has been executed, the Administrative Super User notifies the Organizational Design Expert about the completion of the position mass change request. This can be done for example via an email, or a phone call.

### Receiving Position Mass Change Completion Notification (process step outside software)

Purpose

The Organizational Design Expert has received the notification from the Administrative Super User that the mass change of positions has been completed.

# Appendix

## Assigning Employee to Position

Purpose

In case employees already exist in the Employee Central instance at the point in time when Position Management is implemented, you can assign them to newly created positions as appropriate.

Procedure

1. Log on to Employee Central as an HR Administrator.
2. 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 whose data you want to maintain. Choose in the list of employees matching the search criteria the appropriate employee. You are directed to the Employee Files page in which the profile of the selected employee is displayed.
3. Go to the Employment Information section and there scroll to the Job Information subsection. Select the Clock (History) icon next to the Job Information block.
4. In the Change History part of the upcoming Job Information Changes dialog box, select the appropriate New Hire record and choose the Edit button.
5. In the Edit History of Job Information on <hire date> dialog box, make sure that in the When would you like your changes to take effect? field the employee’s hiring date is displayed.
6. In the Position Information block make the following entries:

| Field Name | User Action and Values | Comment | Expected Result |
| --- | --- | --- | --- |
| Position | select from drop-down | After having selected the position, you can select the View Org Chart icon next to this field to view details on the position in the org chart. | Several fields in the Organizational Information and Job Information blocks will be auto-populated from the position based on the propagation rule configured in the instance. |
| Position Entry Date | enter same date as hiring date, or different date if position entry date is different | In case you leave the field empty, upon saving the record, the value will be automatically filled with the hiring date, and can be checked in the employee profile. |  |

1. Review the data displayed in the other blocks, like Organization Information, Job Information, Time Off Information (visible only if the Time Off module has been implemented in the instance) and maintain missing information if appropriate.
2. Choose the Save button to save the record. The data is saved and is visible in the employee’s Organizational Information subsection of the Employment Information section.

Result

Employees already existing in the system have been assigned to positions.

## Automated Daily Hierarchy Adaptation

If the position hierarchy is your leading hierarchy, you can have the system automatically adapt the hierarchies using a daily job if they are not in sync.

For example, if you assign employee E0 to position A today and position A has position B with incumbent E1 as higher-level position, the system derives E1 as the new supervisor (line manager) for employee E0. If position A already has a new higher-level position with incumbent E2 assigned for the future, the assignment of line manager E1 will be wrong for employee E0 with the beginning of the new parent position assignment.

To fix such inconsistencies, you can schedule a job that will set the correct line manager based on the position hierarchy. For details on setting up the daily job “BizX Daily Rules Processing Batch” refer to the Position Management workbook.

To verify the correct functioning of the daily job, proceed as follows:

* Search for a position A that has no incumbent yet and whose higher-level position B has already an incumbent E1.
* Move position A below another higher-level position C (having incumbent E2) starting a future date. Proceed for this as described in Use case 4: change of the higher-level position of a position described at the end of process step 4.3.1 Requesting Position Update within this test script. For testing purposes use tomorrow’s date.
* Hire an employee E0 on position A before the change in higher-level position of this position becomes effective. In case the Core content has been deployed with the SAP Best Practices, you can proceed as described in test script of scope item Add New Employee / Rehire (FJ0). For testing purposes use today’s date. For Job Information section, consider the Option of having Position Management implemented in the Employee Central instance. The line manager of the employee will be the incumbent of position B from today, namely E1.  
  Note, that the fact that position A will have in the future a new higher-level position (and implicitly a new line manager for the employee just hired) is not reflected neither in the Job Information subsection of the new hire, nor in the Org Chart. In the Position Org Chart instead, the future change is reflected, meaning the position of employee E0 is below the position of employee E2 starting the considered future date.
* After the daily run of the job “BizX Daily Rules Processing Batch”, verify the following:
  + The job has detected a change. To verify this, go to Admin Center and in the Company Processes & Cycles portlet navigate to Employee Files → Monitor Jobs. Select the Download Status link next to the relevant record of the job type BizX Daily Rules Processing Batch. Check the content of the downloaded CSV file.
  + The Job Information of employee E0 shows a new record in which the line manager has changed. To verify this, search employee E0; go to the Employment Information section. In the Job Information subsection, select the Clock (History) icon next to the Job Information block. In the Change History part of the upcoming Job Information Changes dialog box, select the future dated record and verify that the new line manager is E2.
  + In the Org Chart the change is also reflected: employee E0 is below employee E2.

## Executing Process Steps using Mobile App

As mentioned in chapter Overview Table, several process steps can be executed via mobile device. For this, the SAP SuccessFactors Mobile application must have been activated on the mobile devices of the persons executing these steps.

 Recommendation

For details on activating the SAP SuccessFactors Mobile application, refer to the Read Me document.

In the following, the procedure for executing the process steps using mobile devices are given.

### Processing Requests

Purpose

If the SAP SuccessFactors Mobile application has been activated on the mobile devices of the approvers of requests, they receive the requests also on their mobile devices. Instead of approving/rejecting the requests on the company instance website, they can do so on their mobile devices.

For this scope item, following users can activate the SAP SuccessFactors Mobile application:

* members of HR Administrator group, and
* members of Headcount Approver group, and
* line managers.

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, position creation, position update, or employee job information update).
3. On the Details screen, review the request.
   1. If satisfied, tap Approve.
   2. If not satisfied, 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.

In the assumption that the Employee Central related content in your instance has been deployed with the SAP Best Practices, you can test following business processes.

### Preceding Processes

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

| Process | Business Condition |
| --- | --- |
| In case the Company Structure Overview functionality has been implemented using the SAP Best Practices: Manage Company Structure (2OY) (Optional); otherwise follow the procedure described in chapter Preliminary Steps. | The company structure needs to be in place. |

### Succeeding Processes

After completing the activities in this test case, you can continue testing the following business processes:

| Process | Business Condition |
| --- | --- |
| In case the Core content has been deployed: Add New Employee / Rehire (FJ0) | Employees can be hired (or rehired) on the existing positions. |

Changes in the employee’s job information might have impact on the position to which the employee is assigned. For more details you can refer to the test scripts of following scope items:

* In case the Core content has been deployed:
  + Take Action: Job Change/Transfer/Pay Rate Change (FJ1),
  + Take Action: Termination (FJ3),
* Either Request and Manage Time Off (FJ7) (in case the Time Off content has been deployed) or Manage Leave Of Absence (10B) (in case the Time Off for Leave of Absence Only module has been implemented)
* In case Global Assignment Management has been deployed: Manage Global Assignment (1ZA)
* In case Concurrent Employment Management has been deployed: Manage Concurrent Employment (1Z8)

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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