



**PUBLIC**

SAP Best Practices for SAP SuccessFactors Compensation

Document Version: 2H 2023 – 2023-11-07

# **Milestone Award Points-based Service Milestone Program with Integration to Employee Central: Test Script**

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# 1 Milestone Award Points-based Service Milestone Program with Integration to Employee Central

The detailed procedure for testing the scope item **Milestone Award Points-based Service Milestone Program with Integ to EC** after solution activation is described in the following. Each process step is covered in its own section.

Reward and Recognition are events that take place at times other than during the regular compensation planning period. These events are often subject to the same program type, point type, milestone start date, eligibility and approval process as focal events, but since participation is limited, they do not lend themselves well to worksheet tools. As a result, effectively managing reward and recognition and compensation changes is a major challenge for a compensation team.

Recognition for years of service is among the most popular recognition programs in organizations. Milestone award programs allow you to automate this recognition and provide a great experience to employees and managers. Milestone award programs provide point-based awards. These points can be accumulated and then redeemed by the employee.

## i Note

Redemption of milestone awards is not in scope of this SAP Best Practices.

## i Note

The Reimagined Home Page (Latest Home Page) will be pushed to all customer instances that are not already migrated. For more details, check the [Migration to Reimagined Home Page](#) post in the *SAP SuccessFactors Community*.

All home page activities described in this guide are based on the new UI experience.

## 2 Prerequisites

This section summarizes all prerequisites needed to conduct the test in terms of template, system, user, and other test data and business conditions.

### 2.1 System Access and Roles

The test is conducted in the following systems:

System	Details
SAP SuccessFactors	<Provide details on how to access system, for example system client or URL>

Use the following standard test users or assign roles to testers, respectively:

Business Role	Business Role Description	Business Role ID	Log On
Compensation Administrator	Users who can prepare milestone award program.	SFCC Compensation Administrator	For testing purposes, proxy as the role using superuser role
Employee	Users who can check his/her milestone award.	SFCC Employee on Self	For testing purposes, proxy as the role using superuser role
Line Manager	Users who can check milestone award for direct reports.	SFCC Manager on Team	For testing purposes, proxy as the role using superuser role

### 2.2 Business Conditions

The business process described in this Test Script is part of a larger chain of business processes or scenarios.

Business Condition	Comment
1. The organizational structure and employee master data of your company have been created in your system.	

## 2.3 Preliminary Steps

During configuration phase, you have already prepared a service milestone program. However, before your company's use spot awards starts every two years, you need to ensure that the spot award program is most up-to-date to reflect your company's actual business requirements. Perform following steps to create the current plan period in your program and if needed, adjust the pre-configured program settings, such as point type, milestone start date and eligibility rules.

### 2.3.1 Preparing Service Milestone Program

#### Purpose

The service milestone award program is updated by the Compensation Administrator in preparation for the spot awards taking place every two years. For this purpose, he or she first creates the new service milestone award program. Then he or she maintains the point type, milestone start date and eligibility rules.

#### Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	Log on	Log on to <b>SAP SuccessFactors Company Instance</b> as <i>Compensation Administrator</i> .	The <i>Home</i> page is displayed.	
2.	Access Admin Center	Choose ► <i>Home</i> ► <i>Admin Center</i> ► from the menu in the top left corner.	The <i>Admin Center</i> screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	Access Milestone Award Program tile	Type <i>Reward and Recognition</i> in the tool search box and select the feature/tool from the list. On the <i>Reward and Recognition Admin</i> page, choose the <i>Manage Milestone Award Programs</i> tile.	The <i>Award Programs</i> settings screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail						
4.	<b>Create New Milestone Award Program</b>	<p>On the top right of the screen, choose <i>Create Program</i>.</p> <p>On the <i>Program Settings</i> tab, enter in field <i>Name</i> the name of the milestone award program to reflect the requirements, for example <b>Milestone Award Points-based Service Milestone Program (with EC)</b>.</p> <p>Fill in the following fields:</p> <p><i>Description:</i> <b>Milestone Award Points-based Program (with EC)</b></p> <p><i>Program Type:</i> <b>Points</b></p> <p><i>Point Type:</i> <b>Point</b></p> <p><i>Milestone Start Date:</i> <b>Hire Date</b></p> <p><i>Pay Component:</i> <b>Recognition Award (4915)</b></p> <p><i>Employee Email Group:</i> <b>SFCC Milestone Email Group</b></p> <p>When done, choose <i>Save and Proceed</i>.</p> <p>On the <i>Eligibility</i> tab, check the <b>Business Rule Engine</b> radio button for <i>Settings</i>.</p> <p>From the <i>Eligibility</i> dropdown list, select the appropriate eligibility rule, for example: <b>SFCC_RNR_ELIG</b>.</p> <p>When done, choose <i>Save and Proceed</i>.</p> <p>On the <i>Milestone Configuration</i> tab, choose <i>Add Country/Region</i>.</p> <p>From the <i>Country/Region</i> value help, select the country/region name, for example, <b>United States (USA)</b>.</p> <p>At the right top corner of the <i>Milestones</i> table, choose <i>Add Milestone</i> and fill in the editable fields according to your requirements.</p> <div style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p><b>i Note</b></p> <p>You need to choose <i>Add Milestone</i> for each milestone you want to add for the award program.</p> </div> <p>For example, enter as follows:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><i>Duration</i></th> <th style="text-align: left;"><i>Dimension</i></th> <th style="text-align: left;"><i>Award amount</i></th> </tr> </thead> <tbody> <tr> <td><b>5</b></td> <td><b>Years</b></td> <td><b>500</b></td> </tr> </tbody> </table>	<i>Duration</i>	<i>Dimension</i>	<i>Award amount</i>	<b>5</b>	<b>Years</b>	<b>500</b>	The service milestone award program has been created.	
<i>Duration</i>	<i>Dimension</i>	<i>Award amount</i>								
<b>5</b>	<b>Years</b>	<b>500</b>								

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		10 <b>Years</b> 1000		
		15 <b>Years</b> 2000		
		20 <b>Years</b> 3000		
		When done, choose <i>Save and Proceed</i> .		
		Choose <i>Create</i> to save your changes.		
		Choose <i>Done</i> to complete the configuration.		
5.	<b>Activate Milestone Award Program</b>	Choose <i>Activate</i> to activate the milestone award program. In the upcoming <i>Activate Program</i> dialog box, choose <i>Activate</i> again to confirm your choice.	The service milestone award program has been activated.	

## 2.4 Activate SAP SuccessFactors Mobile Application (Optional)

Before mobile related process steps can be executed, you need first to **install** and **activate** your SAP SuccessFactors Mobile application on your mobile device. There are four ways to activate the SAP SuccessFactors Mobile Application on mobile devices, and this document only describes the QR Code Activation. For other ways and more deployment information on how to set up Mobile application, refer to the **SAP SuccessFactors Mobile Deployment Guide** located on [SAP Help Portal](#).

To activate your SAP SuccessFactors Mobile application using the QR code proceed as follows:

1. Download and install the *SAP SuccessFactors Mobile App* in your mobile device (from App Store).
2. The user, who needs to execute the process steps on the mobile, logs in to the SAP SuccessFactors website.
3. Choose the dropdown menu and select *Options*.
4. In the *Options* screen, select *Mobile*.
5. Select *Activate via Camera* option.
6. The camera is activated and you have 30 seconds to scan the displayed QR Code.
7. Open the SAP SuccessFactors Mobile App on your mobile device.
8. Tap the *Add Profile* box and tap *Scan QR Code* button, scan the QR Code displayed in your SAP SuccessFactors website.
9. If the QR Code expires, click the *Get New Code* button to generate a new QR Code.
10. Once the QR Code is validated, the *User License* screen appears on your mobile device. Read the *End User License Agreement (EULA)* and make the appropriate selections on the mobile device to accept the User License Agreement.



11. The *SAP SuccessFactors mobile application* is now activated. The corresponding user profile is added.

#### **i** Note

For testing purpose, you can use one mobile device for different business roles involved in the Reward and Recognition process. To realize this, repeat the steps listed above using different users, such that you then can get all user profiles prepared in your SAP SuccessFactors Mobile App.

In this SAP Best Practices, following users should be prepared before you perform the process steps:

- Employee
- Line Manager

### 3 Overview Table

The scope item **Milestone Award Points-based Service Milestone Program with Integ to EC** consists of several process steps provided in the table below.

Process Step	Business		Expected Results
	Role	Transaction	
<a href="#">Sending Service Milestone Award Notification [page 11]</a>	Scheduled Job in Provisioning	Background	Once the employee has reached the milestone, an email notification is sent out to the employee and the line manager.
<a href="#">Receiving Service Milestone Award Notification [page 11]</a>	Employee, Line Manager	Background	The appropriate employee has received an email, notifying of the receipt of a service milestone award. The employee's line manager has received the same email notification on cc.
<a href="#">Viewing my Service Milestone Award (Optional) [page 12]</a>	Employee	Company Instance URL	The employee has viewed the detailed service milestone award.
<a href="#">Redeeming my Service Milestone Award (Outside Scope Item Scope) [page 13]</a>	Employee	Company Instance URL	The employee has redeemed the service milestone award with an identified partner.
<a href="#">Verifying Employee Compensation Information [page 14]</a>	Line Manager	Company Instance URL	It has been verified, if the service milestone award amount has been transferred as expected to the compensation information of the employee.

## 4 Test Procedures

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

The test should take around 30 minutes.

### 4.1 Sending Service Milestone Award Notification

#### Purpose

The eligibility for service milestone awards has been defined when creating the award program. When a program is active, eligibility and awarding job are automatically run daily in provisioning.

Once the employee reaches the milestone as defined in the service milestone award program, an email notification is sent out to the employee and his or her line manager.

#### Procedure

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

### 4.2 Receiving Service Milestone Award Notification

#### Purpose

The Employee, who has reached a certain milestone defined in the service milestone award program, for example, a work anniversary, receives an email, notifying of the receipt of the service milestone award. This email contains details to the points received.

The employee's Line Manager receives the same email notification on cc.

## Procedure

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

### 4.3 Viewing my Service Milestone Award (Optional)

#### Purpose

The Employee views the received service milestone award from the *Awards History* section of the *Reward and Recognition* home page.

#### Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	Log on	Log on to <b>SAP SuccessFactors Company Instance</b> as <i>Employee</i> .	The <i>Home</i> page is displayed.	
2.	Access Reward and Recognition page	Choose <b>Home</b> > <b>Compensation</b> from the menu in the top left corner, then choose the <i>Reward and Recognition</i> tab.	The <i>Reward and Recognition</i> page is displayed. The <i>Redeem Rewards</i> tile displays on the left, the <i>Awards History</i> tile displays on the right of the screen.  In the <i>Redeem Rewards</i> tile, your reward balance is displayed.	
3.	Select Received Milestone Awards	In the <i>Awards History</i> tile, choose the <i>Myself</i> tab, and select <i>Received</i> from the dropdown under <i>Milestone Awards</i> .	Each received service milestone award appears in a quick card within the tile. The system populates the last five awards received.	
4.	View Details of Received Milestone Award	To view details of the received award, choose the appropriate quick card on the <i>View Details</i> link.	The <i>Award Details</i> page opens, containing all the information to this award.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	View Details of All Received Milestone Awards (Optional)	Optionally, you can choose the <a href="#">Awards History tile</a> > <a href="#">Myself tab</a> > <a href="#">Milestone Awards Received</a> view on the <a href="#">View All</a> link.	The <a href="#">My Awards History</a> page is displayed, in which all milestone awards you have received so far are listed.	
		You can choose the appropriate row in the table.	On the right side of the screen the award details display on the <a href="#">Milestone Award Points-based Service Milestone Program (with EC)</a> page.	

## 4.4 Redeeming my Service Milestone Award (Outside Scope Item Scope)

### Purpose

In a points-based program, recipients receive points instead of direct compensation. The system converts the points to virtual currency that employees redeem with identified partners. A contract with the redemption partner must have been set up before the points-based awards program becomes functional.

### Procedure

1. Log on to **SAP SuccessFactors Company Instance** as *Employee*.
2. Choose [Home](#) > [Compensation](#) from the menu in the top left corner, then choose the [Reward and Recognition](#) tab.
3. In the [Redeem Rewards](#) tile, choose [Redeem](#) for the appropriate service milestone award.
4. Proceed as per the instructions on the screen.

## 4.5 Verifying Employee Compensation Information

### Purpose

If customers deploy **Employee Central**, they can set up the integration with the Compensation module. Upon successful publishing of the service milestone award data into Employee Central, the line managers can verify if the Milestone Awards are transferred correctly into the compensation information of their direct reports.

### 4.5.1 Verifying Employee Compensation Information on Company Website

### Purpose

The employee's line manager verifies on the company website if the service milestone award amount has been transferred as expected to the compensation information of the employee.

### Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	Log on	Log on to <b>SAP SuccessFactors Instance</b> as <i>Line Manager</i> .	The <i>Home</i> page is displayed.	
2.	Access Employee File	Choose <b>Home</b> > <i>Employee Files</i> from the menu in the top left corner.	The <i>Employee Files</i> screen is displayed.	
3.	Select Employee	Choose the dropdown arrow next to <i>&lt;your name&gt;</i> and select from the <i>Direct Reports</i> section the employee for whom a service milestone award has been granted.	The <i>Employee Files</i> page for the selected employee is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	Verify Spot Award	<p>Go to the <i>Compensation Information</i> section and there navigate down to the <i>Pay Component Non Recurring</i> subsection.</p> <p>In the <i>One Time Payment</i> block, select the appropriate award from the <i>Time Period</i> dropdown list and verify that the amount (displayed in field <i>Amount</i>) has been transferred correctly from the <i>Compensation</i> module.</p>	The service milestone award is shown on the screen.	

## 4.5.2 Verifying Employee Compensation Information via Mobile Device (Optional)

### Purpose

The employee's line manager verifies via his or her mobile device if the service milestone award amount has been transferred as expected to the compensation information of the employee.

#### i Note

If the mobile application is not enabled, this option is not available and only the procedure described in [Verifying Employee Compensation Information on Company Website \[page 14\]](#) can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

### Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	Log on	Open the <b>SAP SuccessFactors mobile</b> app and log on as <i>Line Manager</i> by tapping the corresponding user name in the <i>Multi-Profile</i> screen.	The <i>To-Do</i> page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	Access Employee File	Go to the <i>More</i> tab and tap <i>Profile</i> .	The <i>Profile</i> screen opens.	
3.	Search the Employee	Tap the employee who has received a service milestone award.	Nominee's <i>Profile</i> screen is displayed for the selected.	
4.	View Compensation Information	Tap <i>Compensation Information</i> .	The <i>Compensation Information</i> is shown on the screen.	
5.	Verify Spot Bonus	Tap <i>Spot Bonus</i> .	The <i>Spot Bonus</i> information is shown on the screen.	





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