HR Infotypes

HELP.HRINF

Release 4.6C

SAP™

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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax
	Tip

Inhalt

HR Infotypes 26
PA - Personnel Management 27
PA - RC Recruitment 28
Education (Infotype 0022) 29
Contract Elements (0016) Infotype 30
Applicant Actions (Infotype 4000) 31
Applications (Infotype 4001) 32
Vacancy Assignment (Infotype 4002) 33
Applicant Activities (Infotype 4003) 34
Applicant's Personnel Number (Infotype 4005) 35
Employee's Applicant Number (Infotype 0139) 36
Status of Applicant Activity (Infotype 4004) 37
BC - Organizational Management 38
About the Object Infotype (1000) 39
About the Relationship Infotype (1001) 40
About the Description Infotype (1002) 42
Department/Staff (Infotype 1003) 43
About the Character Infotype (1004) 45
About the Restrictions Infotype (1006) 47
Vacancy (Infotype 1007) 48
Account Assignment Features (Infotype 1008) 50
About the Health Examinations Infotype (1009) 52
About the Authorities and Resources Infotype (1010) 53
Work Schedule (Infotype 1011) 54
About the Employee Group/Subgroup Infotype (1013) 57
About the Obsolete Infotype (1014) 58
Cost Planning (Infotype 1015) 59
Standard Profiles (Infotype 1016) 61
About the PD Profiles Infotype (1017) 63
About the Site Dependent Info Infotype (1027) 65
About the Address Infotype (1028) 66
About the Mail Address Infotype (1032) 68
The Sales Area Infotype (1037) 70
About the Shift Group Infotype (1039) 71
SAP Organizational Object (Infotype 1208) 73
PT - Personnel Time Management 74
Shift Planning 75
Shift Group (Infotype 1039) 76
Time Recording 77
Absences (Infotype 2001) 78
Attendances Infotype (2002) 81
Substitutions Infotype (2003): Changes to Planned Working Time 83
Availability Infotype (2004) 86
Overtime Infotype (2005) 88
Employee Remuneration Info Infotype (2010) 90
Time Events Infotype (2011) 92
Time Transfer Specifications Infotype (2012) 93

Time Quotas **95**
Absence Quotas Infotype (2006) 96
Attendance Quotas Infotype (2007) 98
Quota Corrections Infotype (2013) 100
Time Quota Compensation Infotype (0416) 102
Time Management Master Record **103**
Organizational Assignment (infotype 0001) 104
Personal Data (Infotype 0002) 105
Payroll Status (Infotype 0003) 106
Planned Working Time (Infotype 0007) 107
Time Recording Information Infotype (0050) 109
Special Absences **110**
Maternity Protection Infotype (0080) 111
Military Service Infotype (0081) 112
Payroll **113**
Australia **114**
Personal Data 115
Addresses (Infotype 0006) 116
Bank Details (Infotype 0009) 117
Challenge (infotype 0004) 118
Personal Data (Infotype 0002) 119
Family/Related Person (Infotype 0021) 120
Internal Medical Service (Infotype 0028) 122
Actions 124
Actions (Infotype 0000) 125
Organizational Data 128
Cost Distribution (Infotype 0027) 129
Organizational Assignment (infotype 0001) 131
Reference Personnel Number (Infotype 0031) 132
Reference Personnel Number Priority (Infotype 0121) 133
Contractual and Company Agreements 136
Company Instructions (infotype 0035) 137
Corporate Function (infotype 0034) 138
Internal Control (Infotype 0032) 139
Works Councils (infotype 0054) 140
Communication (Infotype 0105) 141
Objects on Loan (Infotype 0040) 143
Contract Elements (Infotype 0016) 144
Powers of Attorney (infotype 0030) 146
Payroll 147
General Payroll Data 148
Payroll Status (Infotype 0003) 149
Basic Pay (Infotype 0008) 150
Appraisals (Infotype 0025) 151
Employee Remuneration Info Infotype (2010) 153
Time Quota Compensation Infotype (0416) 155
Additional Payments (Infotype 0015) 156

Membership Fees (Infotype 0057) 157
Notifications Infotype (0128) 158
Standard Wage Maintenance (Infotype 0052) 159
Recurring Payments/Deductions (Infotype 0014) 160
Loans 162
Company Loans (Infotype 0045) 163
Insurance 167
Insurance (Infotype 0037) 168
Evaluation Bases 169
Date Specifications (infotype 0041) 170
Monitoring of Tasks (Infotype 0019) 171
Authorization Administration 173
Test Procedures (Infotype 0130) 174
Belgium 175
Personal Data 176
Addresses (Infotype 0006) 177
Bank Details (Infotype 0009) 178
Challenge (infotype 0004) 179
Personal Data (Infotype 0002) 180
Family/Related Person (Infotype 0021) 181
Internal Medical Service (Infotype 0028) 183
Actions 185
Actions (Infotype 0000) 186
Organizational Data 189
Cost Distribution (Infotype 0027) 190
Organizational Assignment (infotype 0001) 192
Reference Personnel Number (Infotype 0031) 193
Reference Personnel Number Priority (Infotype 0121) 194
Contractual and Company Agreements 197
Company Instructions (infotype 0035) 198
Corporate Function (infotype 0034) 199
Internal Control (Infotype 0032) 200
Works Councils (infotype 0054) 201
Communication (Infotype 0105) 202
Objects on Loan (Infotype 0040) 204
Contract Elements (Infotype 0016) 205
Powers of Attorney (infotype 0030) 207
Payroll 208
General Payroll Data 209
Payroll Status (Infotype 0003) 210
Basic Pay (Infotype 0008) 211
Appraisals (Infotype 0025) 212
Employee Remuneration Info Infotype (2010) 214
Time Quota Compensation Infotype (0416) 216
Additional Payments (Infotype 0015) 217
Membership Fees (Infotype 0057) 218

Notifications Infotype (0128) 219
Standard Wage Maintenance (Infotype 0052) 220
Recurring Payments/Deductions (Infotype 0014) 221
Insurance 223
Insurance (Infotype 0037) 224
Evaluation Bases 225
Date Specifications (infotype 0041) 226
Monitoring of Tasks (Infotype 0019) 227
Authorization Administration 229
Test Procedures (Infotype 0130) 230
Denmark 231
Personal Data 232
Addresses (Infotype 0006) 233
Bank Details (Infotype 0009) 234
Challenge (infotype 0004) 235
Personal Data (Infotype 0002) 236
Family/Related Person (Infotype 0021) 237
Internal Medical Service (Infotype 0028) 239
Actions 241
Actions (Infotype 0000) 242
Organizational Data 245
Cost Distribution (Infotype 0027) 246
Organizational Assignment (infotype 0001) 248
Reference Personnel Number (Infotype 0031) 249
Reference Personnel Number Priority (Infotype 0121) 250
Contractual and Company Agreements 253
Company Instructions (infotype 0035) 254
Corporate Function (infotype 0034) 255
Internal Control (Infotype 0032) 256
Works Councils (infotype 0054) 257
Communication (Infotype 0105) 258
Objects on Loan (Infotype 0040) 260
Contract Elements (Infotype 0016) 261
Powers of Attorney (infotype 0030) 263
Payroll 264
General Payroll Data 265
Payroll Status (Infotype 0003) 266
Basic Pay (Infotype 0008) 267
Appraisals (Infotype 0025) 268
Employee Remuneration Info Infotype (2010) 270
Time Quota Compensation Infotype (0416) 272
Additional Payments (Infotype 0015) 273
Membership Fees (Infotype 0057) 274
Notifications Infotype (0128) 275
Standard Wage Maintenance (Infotype 0052) 276
Recurring Payments/Deductions (Infotype 0014) 277

Loans 279
Company Loans (Infotype 0045) 280
Insurance 284
Insurance (Infotype 0037)....285
Tax Data....286
Fiscal Data (Infotype 0072) 287
Garnishment 288
Garnishment (Infotype 0200)....289
Pensions 290
Private Pension (Infotype 0073) 291
ATP Pension and Barselsfond (Infotype 0075) 292
Company Car....293
Company Car (Infotype 0442) 294
Statistics....296
Statistics (Infotype 0204) 297
Vacation 301
Vacation Savings (Infotype 0074)....302
Evaluation Bases 304
Date Specifications (infotype 0041)....305
Monitoring of Tasks (Infotype 0019) 306
Authorization Administration 308
Test Procedures (Infotype 0130) 309
Germany....310
Personal Data 311
Addresses (Infotype 0006)....312
Bank Details (Infotype 0009) 313
Challenge (infotype 0004)....314
Personal Data (Infotype 0002)....315
Family/Related Person (Infotype 0021) 316
Internal Medical Service (Infotype 0028) 318
Actions....320
Actions (Infotype 0000)....321
Organizational Data 324
Cost Distribution (Infotype 0027) 325
Organizational Assignment (infotype 0001)....327
Reference Personnel Number (Infotype 0031)....328
Reference Personnel Number Priority (Infotype 0121)....329
Contractual and Company Agreements....332
Company Instructions (infotype 0035)....333
Corporate Function (infotype 0034)....334
Internal Control (Infotype 0032)....335
Works Councils (infotype 0054)....336
Communication (Infotype 0105)....337
Objects on Loan (Infotype 0040) 339
Contract Elements (Infotype 0016)....340
Powers of Attorney (infotype 0030) 342

Payroll 343
General Payroll Data....344
Payroll Status (Infotype 0003) 345
Basic Pay (Infotype 0008) 346
Appraisals (Infotype 0025)....347
Employee Remuneration Info Infotype (2010)....349
Time Quota Compensation Infotype (0416) 351
Additional Payments (Infotype 0015)....352
Membership Fees (Infotype 0057)....353
Notifications Infotype (0128)....354
Standard Wage Maintenance (Infotype 0052)....355
Recurring Payments/Deductions (Infotype 0014)....356
Loans 358
Company Loans (Infotype 0045) 359
Insurance 363
Insurance (Infotype 0037)....364
Company Pension Scheme 365
Rentenbasisbezüge (Infotyp 0201)....366
Company Insurance....367
Company Insurance (Infotype 0026) 368
Data Entry and Transfer....369
DEÜV (Infotyp 0020)....370
DEÜV-Start (Infotyp 0341)....371
Child Allowance 373
Kindergeld (Infotyp 0232) 374
Reduced Hours / Bad Weather....375
Kurzarbeit / Winterausfallgeld (Infotyp 0049) 376
Fiscal Data 378
Infotyp Steuerdaten Deutschland (0012)....379
Infotyp Vorarbeitgeber Deutschland (0093)....381
Social Insurance 382
Social Insurance (Infotype 0013)....383
SV-Zusatzversicherungen (Infotyp 0079)....385
Zusatzversorgung (Infotyp 0126)....386
Capital Formation....387
Infotyp Vermögensbildung (0010) 388
Evaluation Bases 392
Date Specifications (infotype 0041)....393
Monitoring of Tasks (Infotype 0019) 394
Workers' Compensation Association (Infotype 0029)....396
Authorization Administration 397
Test Procedures (Infotype 0130) 398
Payroll for Construction Industry....399
Infotyp Bauwirtschaft Sozialkassenverfahren (0189) 400
Infotyp Bauwirtschaft Vorarbeitgeber (0190) 401

Infotyp Bauwirtschaft Aufwendungen (0191) 402
Infotyp Bauwirtschaft Zuordnung (0192) 404
Vermögensbildung Bauwirtschaft 406
France 408
Personal Data 409
Addresses (Infotype 0006) 410
Bank Details (Infotype 0009) 411
Challenge (infotype 0004) 412
Personal Data (Infotype 0002) 413
Family/Related Person (Infotype 0021) 414
Internal Medical Service (Infotype 0028) 416
Actions 418
Actions (Infotype 0000) 419
Organizational Data 422
Cost Distribution (Infotype 0027) 423
Organizational Assignment (infotype 0001) 425
Reference Personnel Number (Infotype 0031) 426
Reference Personnel Number Priority (Infotype 0121) 427
Contractual and Company Actions 430
Company Instructions (infotype 0035) 431
Corporate Function (infotype 0034) 432
Internal Control (Infotype 0032) 433
Works Councils (infotype 0054) 434
Communication (Infotype 0105) 435
Objects on Loan (Infotype 0040) 437
Contract Elements (Infotype 0016) 438
Powers of Attorney (infotype 0030) 440
Payroll Accounting 441
General Payroll Data 442
Payroll Status (Infotype 0003) 443
Basic Pay (Infotype 0008) 444
Appraisals (Infotype 0025) 445
Employee Remuneration Info Infotype (2010) 447
Time Quota Compensation Infotype (0416) 449
Additional Payments (Infotype 0015) 450
Membership Fees (Infotype 0057) 451
Notifications Infotype (0128) 452
Standard Wage Maintenance (Infotype 0052) 453
Recurring Payments/Deductions (Infotype 0014) 454
Loans 456
Company Loans (Infotype 0045) 457
Profit Sharing 461
Insurance 462
Insurance (Infotype 0037) 463
Evaluation Bases 464
Date Specifications (infotype 0041) 465

Monitoring of Tasks (Infotype 0019) 466
Authorization Administration 468
Test Procedures (Infotype 0130) 469
Great Britain 470
Personal Data 471
Addresses (Infotype 0006) 472
Bank Details (Infotype 0009) 473
Challenge (infotype 0004) 474
Personal Data (Infotype 0002) 475
Family/Related Person (Infotype 0021) 476
Internal Medical Service (Infotype 0028) 478
Actions 480
Actions (Infotype 0000) 481
Organizational Data 484
Cost Distribution (Infotype 0027) 485
Organizational Assignment (infotype 0001) 487
Reference Personnel Number (Infotype 0031) 488
Reference Personnel Number Priority (Infotype 0121) 489
Contractual and Company Actions 492
Company Instructions (infotype 0035) 493
Corporate Function (infotype 0034) 494
Internal Control (Infotype 0032) 495
Works Councils (infotype 0054) 496
Communication (Infotype 0105) 497
Contract Elements (Infotype 0016) 499
Powers of Attorney (infotype 0030) 501
Payroll 502
General Payroll Data 503
Payroll Status (Infotype 0003) 504
Basic Pay (Infotype 0008) 505
Appraisals (Infotype 0025) 506
Employee Remuneration Info Infotype (2010) 508
Time Quota Compensation Infotype (0416) 510
Additional Payments (Infotype 0015) 511
Membership Fees (Infotype 0057) 512
Notifications Infotype (0128) 513
Standard Wage Maintenance (Infotype 0052) 514
Recurring Payments/Deductions (Infotype 0014) 515
Loans 517
Company Loans (Infotype 0045) 518
Garnishments 522
Insurance 523
Insurance (Infotype 0037) 524
Social Insurance 525
Retirement Pension Plan 526
Evaluation Bases 527

Date Specifications (infotype 0041) 528
Monitoring of Tasks (Infotype 0019) 529
Berechtigungsverwaltung 531
Test Procedures (Infotype 0130) 532
Indonesia 533
Personal Data 534
Addresses (Infotype 0006) 535
Bank Details (Infotype 0009) 536
Challenge (infotype 0004) 537
Personal Data (Infotype 0002) 538
Family/Related Person (Infotype 0021) 539
Internal Medical Service (Infotype 0028) 541
Actions 543
Actions (Infotype 0000) 544
Organizational Data 547
Cost Distribution (Infotype 0027) 548
Organizational Assignment (infotype 0001) 550
Reference Personnel Number (Infotype 0031) 551
Reference Personnel Number Priority (Infotype 0121) 552
Contractual and Company Agreements 555
Company Instructions (infotype 0035) 556
Corporate Function (infotype 0034) 557
Internal Control (Infotype 0032) 558
Works Councils (infotype 0054) 559
Communication (Infotype 0105) 560
Objects on Loan (Infotype 0040) 562
Contract Elements (Infotype 0016) 563
Powers of Attorney (infotype 0030) 565
Payroll 566
General Payroll Data 567
Payroll Status (Infotype 0003) 568
Basic Pay (Infotype 0008) 569
Appraisals (Infotype 0025) 570
Employee Remuneration Info Infotype (2010) 572
Time Quota Compensation Infotype (0416) 574
Additional Payments (Infotype 0015) 575
Membership Fees (Infotype 0057) 576
Notifications Infotype (0128) 577
Standard Wage Maintenance (Infotype 0052) 578
Recurring Payments/Deductions (Infotype 0014) 579
Loans 581
Company Loans (Infotype 0045) 582
Insurance 586
Insurance (Infotype 0037) 587
Evaluation Bases 588
Date Specifications (infotype 0041) 589

Monitoring of Tasks (Infotype 0019) 590
Authorization Administration 592
Test Procedures (Infotype 0130) 593
Japan 594
Personal Data 595
Addresses (Infotype 0006)....596
Bank Details (Infotype 0009) 597
Challenge (infotype 0004)....598
Personal Data (Infotype 0002)....599
Family/Related Person (Infotype 0021) 600
Internal Medical Service (Infotype 0028) 602
Actions....604
Actions (Infotype 0000)....605
Organizational Data 608
Cost Distribution (Infotype 0027) 609
Organizational Assignment (infotype 0001)....611
Reference Personnel Number (Infotype 0031)....612
Reference Personnel Number Priority (Infotype 0121)....613
Contractual and Company Agreements....616
Company Instructions (infotype 0035)....617
Corporate Function (infotype 0034)....618
Internal Control (Infotype 0032)....619
Works Councils (infotype 0054)....620
Communication (Infotype 0105)....621
Objects on Loan (Infotype 0040) 623
Contract Elements (Infotype 0016)....624
Powers of Attorney (infotype 0030) 626
Payroll 627
General Payroll Data....628
Payroll Status (Infotype 0003) 629
Basic Pay (Infotype 0008) 630
Appraisals (Infotype 0025)....631
Employee Remuneration Info Infotype (2010)....633
Time Quota Compensation Infotype (0416) 635
Additional Payments (Infotype 0015)....636
Membership Fees (Infotype 0057)....637
Notifications Infotype (0128)....638
Standard Wage Maintenance (Infotype 0052)....639
Recurring Payments/Deductions (Infotype 0014)....640
Fiscal Data 642
Insurance 643
Insurance (Infotype 0037)....644
Evaluation Bases 645
Date Specifications (infotype 0041)....646
Monitoring of Tasks (Infotype 0019) 647
Authorization Administration 649

Test Procedures (Infotype 0130) 650
Canada....651
Personal Data 652
Addresses (Infotype 0006)....653
Bank Details (Infotype 0009) 654
Challenge (infotype 0004)....655
Personal Data (Infotype 0002)....656
Family/Related Person (Infotype 0021) 657
Internal Medical Service (Infotype 0028) 659
Actions....661
Actions (Infotype 0000)....662
Organizational Data 665
Cost Distribution (Infotype 0027) 666
Organizational Assignment (infotype 0001)....668
Reference Personnel Number (Infotype 0031)....669
Reference Personnel Number Priority (Infotype 0121)....670
Contractual and Company Agreements....673
Company Instructions (infotype 0035)....674
Corporate Function (infotype 0034)....675
Internal Control (Infotype 0032)....676
Works Councils (infotype 0054)....677
Communication (Infotype 0105)....678
Objects on Loan (Infotype 0040) 680
Contract Elements (Infotype 0016)....681
Powers of Attorney (infotype 0030) 683
Payroll 684
General Payroll Data....685
Payroll Status (Infotype 0003) 686
Basic Pay (Infotype 0008) 687
Appraisals (Infotype 0025)....688
Employee Remuneration Info Infotype (2010)....690
Time Quota Compensation Infotype (0416) 692
Additional Payments (Infotype 0015)....693
Membership Fees (Infotype 0057)....694
Notifications Infotype (0128)....695
Standard Wage Maintenance (Infotype 0052)....696
Recurring Payments/Deductions (Infotype 0014)....697
Loans 699
Company Loans (Infotype 0045) 700
Insurance 704
Insurance (Infotype 0037)....705
Fiscal Data 706
Garnishments....707
Evaluation Bases 708
Date Specifications (infotype 0041)....709
Monitoring of Tasks (Infotype 0019) 710

Special Benefits Administration 712
Authorization Administration 713
Test Procedures (Infotype 0130) 714
Mexico 715
Personal Data 716
Addresses (Infotype 0006)....717
Bank Details (Infotype 0009) 718
Challenge (infotype 0004)....719
Personal Data (Infotype 0002)....720
Family/Related Person (Infotype 0021) 721
Internal Medical Service (Infotype 0028) 723
Actions....725
Actions (Infotype 0000)....726
Organizational Data 729
Cost Distribution (Infotype 0027) 730
Organizational Assignment (infotype 0001)....732
Reference Personnel Number (Infotype 0031)....733
Reference Personnel Number Priority (Infotype 0121)....734
Contractual and Company Agreements....737
Company Instructions (infotype 0035)....738
Corporate Function (infotype 0034)....739
Internal Control (Infotype 0032)....740
Works Councils (infotype 0054)....741
Communication (Infotype 0105)....742
Objects on Loan (Infotype 0040) 744
Contract Elements (Infotype 0016)....745
Powers of Attorney (infotype 0030) 747
Payroll 748
General Payroll Data....749
Payroll Status (Infotype 0003) 750
Basic Pay (Infotype 0008) 751
Appraisals (Infotype 0025)....752
Employee Remuneration Info Infotype (2010)....754
Time Quota Compensation Infotype (0416) 756
Additional Payments (Infotype 0015)....757
Membership Fees (Infotype 0057)....758
Notifications Infotype (0128)....759
Standard Wage Maintenance (Infotype 0052)....760
Recurring Payments/Deductions (Infotype 0014)....761
Loans 763
Company Loans (Infotype 0045) 764
Insurance 768
Insurance (Infotype 0037)....769
Evaluation Bases 770
Date Specifications (infotype 0041)....771
Monitoring of Tasks (Infotype 0019) 772

Authorization Administration 774
Test Procedures (Infotype 0130) 775
The Netherlands 776
Personal Data 777
Addresses (Infotype 0006)....778
Bank Details (Infotype 0009) 779
Challenge (infotype 0004)....780
Personal Data (Infotype 0002)....781
Family/Related Person (Infotype 0021) 782
Sozialfonds (Infotyp 0063) 784
WBEEA (Infotyp 0177)....785
Internal Medical Service (Infotype 0028) 787
Actions....789
Actions (Infotype 0000)....790
Organizational Data 793
Cost Distribution (Infotype 0027) 794
Organizational Assignment (infotype 0001)....796
Reference Personnel Number (Infotype 0031)....797
Reference Personnel Number Priority (Infotype 0121)....798
Contractual and Company Agreements....801
Company Instructions (infotype 0035)....802
Corporate Function (infotype 0034)....803
Internal Control (Infotype 0032)....804
Works Councils (infotype 0054)....805
Communication (Infotype 0105)....806
Objects on Loan (Infotype 0040) 808
Contract Elements (Infotype 0016)....809
Powers of Attorney (infotype 0030) 811
Payroll 812
General Payroll Data....813
Payroll Status (Infotype 0003) 814
Basic Pay (Infotype 0008) 815
Appraisals (Infotype 0025)....816
Employee Remuneration Info Infotype (2010)....818
Time Quota Compensation Infotype (0416) 820
Additional Payments (Infotype 0015)....821
Membership Fees (Infotype 0057)....822
Notifications Infotype (0128)....823
Standard Wage Maintenance (Infotype 0052)....824
Recurring Payments/Deductions (Infotype 0014)....825
Fiscal Data 827
Steuerdaten (Infotyp 0060)....828
Prämiennachlaß (Infotyp 0303) 832
Spezielle Regelungen (Infotyp 0317) 834
Insurance 836
Pensionen (Infotyp 0110) 837

Sozialversicherung (Infotyp 0059) 839
Insurance (Infotype 0037) 842
Evaluation Bases 843
Date Specifications (infotype 0041) 844
Monitoring of Tasks (Infotype 0019) 845
Authorization Administration 847
Test Procedures (Infotype 0130) 848
Austria 849
Personal Data 850
Addresses (Infotype 0006) 851
Bank Details (Infotype 0009) 852
Challenge (infotype 0004) 853
Personal Data (Infotype 0002) 854
Family/Related Person Infotype 0021 855
Internal Medical Service (Infotype 0028) 857
Actions 859
Actions (Infotype 0000) 860
Organizational Data 863
Cost Distribution (Infotype 0027) 864
Organizational Assignment (infotype 0001) 866
Reference Personnel Number (Infotype 0031) 867
Reference Personnel Number Priority (Infotype 0121) 868
Contractual and Company Agreements 871
Company Instructions (infotype 0035) 872
Corporate Function (infotype 0034) 873
Internal Control (Infotype 0032) 874
Works Councils (infotype 0054) 875
Communication (Infotype 0105) 876
Objects on Loan (Infotype 0040) 878
Contract Elements (Infotype 0016) 879
Powers of Attorney (infotype 0030) 881
Payroll 882
General Payroll Data 883
Payroll Status (Infotype 0003) 884
Basic Pay (Infotype 0008) 885
Appraisals (Infotype 0025) 886
Employee Remuneration Info Infotype (2010) 888
Time Quota Compensation Infotype (0416) 890
Additional Payments (Infotype 0015) 891
Membership Fees (Infotype 0057) 892
Notifications Infotype (0128) 893
Standard Wage Maintenance (Infotype 0052) 894
Recurring Payments/Deductions (Infotype 0014) 895
Loans 897
Company Loans (Infotype 0045) 898
Sickness Certificates 902

Sickness Certificates A Infotype (0056) ... 903
Garnishments ... 905
Garnishment/Cession A Infotype (0131) ... 906
Garn. Claim A Infotype (0132) ... 908
Garn. Interest A Infotype (0133) ... 909
Garnishment Amount A Infotype (0134) ... 910
Garn. Conditions A Infotype (0135) ... 911
Garn. Transfer A Infotype (0136) ... 912
Garn. Compensation A Infotype (0137) ... 913
Family Assistance ... 914
Family Allowance A (0043) ... 915
Fiscal Data ... 916
Fiscal Data A Infotype (0042) ... 917
Previous Employer A Infotype (0055) ... 919
Commuter Rate A Infotype (0058) ... 920
Social Insurance ... 921
Social Insurance A Infotype (0044) ... 922
SI Notification Supplements A Infotype (0367) ... 924
Work and Remuneration Confirmation A Infotype (0526) ... 927
Insurance ... 929
Insurance (Infotype 0037) ... 930
Payments on Leaving ... 931
Payments upon Leaving A Infotype (0527) ... 932
Evaluation Bases ... 935
Date Specifications (infotype 0041) ... 936
Monitoring of Tasks (Infotype 0019) ... 937
Authorization Administration ... 939
Test Procedures (Infotype 0130) ... 940
Switzerland ... 941
Personal Data ... 942
Addresses (Infotype 0006) ... 943
Residence Status Infotype (0048) ... 944
Bank Details (Infotype 0009) ... 945
Challenge (infotype 0004) ... 946
Personal Data (Infotype 0002) ... 947
Family/Related Person (Infotype 0021) ... 948
Internal Medical Service (Infotype 0028) ... 950
Actions ... 952
Actions (Infotype 0000) ... 953
Organizational Data ... 956
Cost Distribution (Infotype 0027) ... 957
Organizational Assignment (infotype 0001) ... 959
Reference Personnel Number (Infotype 0031) ... 960
Reference Personnel Number Priority (Infotype 0121) ... 961
Additional Organizational Assignment Infotype (0039) ... 964
Vertragliche und betriebliche Maßnahmen ... 965

Company Instructions (infotype 0035) 966
Corporate Function (infotype 0034) 967
Internal Control (Infotype 0032) 968
Works Councils (infotype 0054) 969
Communication (Infotype 0105) 970
Objects on Loan (Infotype 0040) 972
Contract Elements (Infotype 0016) 973
Powers of Attorney (infotype 0030) 975
Payroll 976
General Payroll Data 977
Payroll Status (Infotype 0003) 978
Basic Pay (Infotype 0008) 979
Appraisals (Infotype 0025) 980
Employee Remuneration Info Infotype (2010) 982
Time Quota Compensation Infotype (0416) 984
Additional Payments (Infotype 0015) 985
Membership Fees (Infotype 0057) 986
Notifications Infotype (0128) 987
Standard Wage Maintenance (Infotype 0052) 988
Recurring Payments/Deductions (Infotype 0014) 989
Company Allowance 991
Company Pension Fund Infotype 0046 992
Company Pension CH Infotype 0120 994
Loans 995
Company Loans (Infotype 0045) 996
Fiscal Data 1000
Fiscal Data CH infotype (0038) 1001
Insurance 1003
Social Insurance CH Infotype (0036) 1004
Insurance (Infotype 0037) 1006
Evaluation Bases 1007
Date Specifications (infotype 0041) 1008
Monitoring of Tasks (Infotype 0019) 1009
Authorization Administration 1011
Test Procedures (Infotype 0130) 1012
Singapore 1013
Personal Data 1014
Addresses (Infotype 0006) 1015
Bank Details (Infotype 0009) 1016
Challenge (infotype 0004) 1017
Personal Data (Infotype 0002) 1018
Family/Related Person (Infotype 0021) 1019
Internal Medical Service (Infotype 0028) 1021
Actions 1023
Actions (Infotype 0000) 1024
Organizational Data 1027

Cost Distribution (Infotype 0027) 1028
Organizational Assignment (infotype 0001)....1030
Reference Personnel Number (Infotype 0031)....1031
Reference Personnel Number Priority (Infotype 0121)....1032
Contractual and Company Agreements....1035
Company Instructions (infotype 0035)....1036
Corporate Function (infotype 0034)....1037
Internal Control (Infotype 0032)....1038
Works Councils (infotype 0054)....1039
Communication (Infotype 0105)....1040
Objects on Loan (Infotype 0040) 1042
Contract Elements (Infotype 0016)....1043
Powers of Attorney (infotype 0030) 1045
Payroll 1046
General Payroll Data....1047
Payroll Status (Infotype 0003) 1048
Basic Pay (Infotype 0008) 1049
Appraisals (Infotype 0025)....1050
Employee Remuneration Info Infotype (2010)....1052
Time Quota Compensation Infotype (0416) 1054
Additional Payments (Infotype 0015)....1055
Membership Fees (Infotype 0057)....1056
Notifications Infotype (0128)....1057
Standard Wage Maintenance (Infotype 0052)....1058
Recurring Payments/Deductions (Infotype 0014)....1059
Loans 1061
Company Loans (Infotype 0045) 1062
Insurance 1066
Insurance (Infotype 0037)....1067
Evaluation Bases 1068
Date Specifications (infotype 0041)....1069
Monitoring of Tasks (Infotype 0019) 1070
Authorization Administration 1072
Test Procedures (Infotype 0130) 1073
Spain....1074
Personal Data 1075
Addresses (Infotype 0006)....1076
Bank Details (Infotype 0009) 1077
Challenge (infotype 0004)....1078
Personal Data (Infotype 0002)....1079
Family/Related Person (Infotype 0021) 1080
Internal Medical Service (Infotype 0028) 1082
Actions....1084
Actions (Infotype 0000)....1085
Organizational Data 1088
Cost Distribution (Infotype 0027) 1089

Organizational Assignment (infotype 0001) 1091
Reference Personnel Number (Infotype 0031) 1092
Reference Personnel Number Priority (Infotype 0121) 1093
Contractual and Company Agreements 1096
Company Instructions (infotype 0035) 1097
Corporate Function (infotype 0034) 1098
Internal Control (Infotype 0032) 1099
Works Councils (infotype 0054) 1100
Communication (Infotype 0105) 1101
Objects on Loan (Infotype 0040) 1103
Contract Elements (Infotype 0016) 1104
Powers of Attorney (infotype 0030) 1106
Payroll 1107
General Payroll Data 1108
Payroll Status (Infotype 0003) 1109
Basic Pay (Infotype 0008) 1110
Appraisals (Infotype 0025) 1111
Employee Remuneration Info Infotype (2010) 1113
Time Quota Compensation Infotype (0416) 1115
Additional Payments (Infotype 0015) 1116
Membership Fees (Infotype 0057) 1117
Notifications Infotype (0128) 1118
Standard Wage Maintenance (Infotype 0052) 1119
Recurring Payments/Deductions (Infotype 0014) 1120
Loans 1122
Company Loans (Infotype 0045) 1123
Insurance 1127
Insurance (Infotype 0037) 1128
Evaluation Bases 1129
Date Specifications (infotype 0041) 1130
Monitoring of Tasks (Infotype 0019) 1131
Authorization Administration 1133
Test Procedures (Infotype 0130) 1134
South Africa 1135
Personal Data 1136
Addresses (Infotype 0006) 1137
Bank Details (Infotype 0009) 1138
Challenge (infotype 0004) 1139
Personal Data (Infotype 0002) 1140
Family/Related Person (Infotype 0021) 1141
Internal Medical Service (Infotype 0028) 1143
Actions 1145
Actions (Infotype 0000) 1146
Organizational Data 1149
Cost Distribution (Infotype 0027) 1150
Organizational Assignment (infotype 0001) 1152

Reference Personnel Number (Infotype 0031) 1153
Reference Personnel Number Priority (Infotype 0121) 1154
Contractual and Company Agreements 1157
Company Instructions (infotype 0035) 1158
Corporate Function (infotype 0034) 1159
Internal Control (Infotype 0032) 1160
Works Councils (infotype 0054) 1161
Communication (Infotype 0105) 1162
Objects on Loan (Infotype 0040) 1164
Contract Elements (Infotype 0016) 1165
Powers of Attorney (infotype 0030) 1167
Payroll 1168
General Payroll Data 1169
Payroll Status (Infotype 0003) 1170
Basic Pay (Infotype 0008) 1171
Appraisals (Infotype 0025) 1172
Employee Remuneration Info Infotype (2010) 1174
Time Quota Compensation Infotype (0416) 1176
Additional Payments (Infotype 0015) 1177
Membership Fees (Infotype 0057) 1178
Notifications Infotype (0128) 1179
Standard Wage Maintenance (Infotype 0052) 1180
Recurring Payments/Deductions (Infotype 0014) 1181
Fiscal Data 1183
Insurance 1184
Insurance (Infotype 0037) 1185
Evaluation Bases 1186
Date Specifications (infotype 0041) 1187
Monitoring of Tasks (Infotype 0019) 1188
Authorization Administration 1190
Test Procedures (Infotype 0130) 1191
USA 1192
Personal Data 1193
Addresses (Infotype 0006) 1194
Bank Details (Infotype 0009) 1195
Challenge (infotype 0004) 1196
Personal Data (Infotype 0002) 1197
Family/Related Person (Infotype 0021) 1198
Internal Medical Service (Infotype 0028) 1200
Actions 1202
Actions (Infotype 0000) 1203
Organizational Data 1206
Cost Distribution (Infotype 0027) 1207
Organizational Assignment (infotype 0001) 1209
Reference Personnel Number (Infotype 0031) 1210
Reference Personnel Number Priority (Infotype 0121) 1211

Contractual and Company Agreements 1214
Company Instructions (infotype 0035) 1215
Corporate Function (infotype 0034) 1216
Internal Control (Infotype 0032) 1217
Works Councils (infotype 0054) 1218
Communication (Infotype 0105) 1219
Objects on Loan (Infotype 0040) 1221
Contract Elements (Infotype 0016) 1222
Powers of Attorney (infotype 0030) 1224
Payroll 1225
General Payroll Data 1226
Payroll Status (Infotype 0003) 1227
Basic Pay (Infotype 0008) 1228
Appraisals (Infotype 0025) 1229
Employee Remuneration Info Infotype (2010) 1231
Time Quota Compensation Infotype (0416) 1233
Additional Payments (Infotype 0015) 1234
Membership Fees (Infotype 0057) 1235
Notifications Infotype (0128) 1236
Standard Wage Maintenance (Infotype 0052) 1237
Recurring Payments/Deductions (Infotype 0014) 1238
Loans 1240
Company Loans (Infotype 0045) 1241
Insurance 1245
Insurance (Infotype 0037) 1246
Evaluation Bases 1247
Date Specifications (infotype 0041) 1248
Monitoring of Tasks (Infotype 0019) 1249
Special Benefits Administration 1251
Authorization Administration 1252
Test Procedures (Infotype 0130) 1253
Other Countries 1254
Personal Data 1255
Addresses (Infotype 0006) 1256
Bank Details (Infotype 0009) 1257
Challenge (infotype 0004) 1258
Personal Data (Infotype 0002) 1259
Family/Related Person (Infotype 0021) 1260
Internal Medical Service (Infotype 0028) 1262
Actions 1264
Actions (Infotype 0000) 1265
Organizational Data 1268
Cost Distribution (Infotype 0027) 1269
Organizational Assignment (infotype 0001) 1271
Reference Personnel Number (Infotype 0031) 1272
Reference Personnel Number Priority (Infotype 0121) 1273

Sales Data (Infotype 0900) 1276
Contractual and Company Agreements 1277
Company Instructions (infotype 0035) 1278
Corporate Function (infotype 0034) 1279
Internal Control (Infotype 0032) 1280
Works Councils (infotype 0054) 1281
Communication (Infotype 0105) 1282
Objects on Loan (Infotype 0040) 1284
Contract Elements (Infotype 0016) 1285
Powers of Attorney (infotype 0030) 1287
Payroll 1288
General Payroll Data 1289
Payroll Status (Infotype 0003) 1290
Basic Pay (Infotype 0008) 1291
Appraisals (Infotype 0025) 1292
Employee Remuneration Info Infotype (2010) 1294
Time Quota Compensation Infotype (0416) 1296
Additional Payments (Infotype 0015) 1297
Membership Fees (Infotype 0057) 1298
Notifications Infotype (0128) 1299
Standard Wage Maintenance (Infotype 0052) 1300
Recurring Payments/Deductions (Infotype 0014) 1301
Loans 1303
Company Loans (Infotype 0045) 1304
Insurance 1308
Insurance (Infotype 0037) 1309
Evaluation Bases 1310
Date Specifications (infotype 0041) 1311
Monitoring of Tasks (Infotype 0019) 1312
Authorization Administration 1314
Test Procedures (Infotype 0130) 1315
PE - Training and Event Managment 1316
Prices (Infotype 1021) 1317
Availability Indicators (Infotype 1023) 1318
Capacity (Infotype 1024) 1321
Business Event Info (Infotype 1026) 1323
Site-Dependent Additional Info (Infotype 1027) 1324
Address (Infotype 1028) 1325
Business Event Type Info (Infotype 1029) 1327
Procedure (Infotype 1030) 1329
Mail Address (Infotype 1032) 1330
Name Format (Infotype 1034) 1331
Schedule (Infotype 1035) 1332
Costs (Infotype 1036) 1333
Billing/Allocation Info (Infotype 1037) 1334

Business Event Blocks (Infotype 1041) 1335
Schedule Model (Infotype 1042) 1336
Demand (Infotype 1060) 1338

HR Infotypes

HR Infotypes

PA - Personnel Management

PA - RC Recruitment

Education (Infotype 0022)

Definition

You can store an employee or applicant's educational details in infotype *Education* (0022).

Use

If you want to depict an employee or applicant's complete educational history, create the infotype record with the relevant educational period.

Enter the following data for each educational history:

- Educational establishment (e.g. primary school, college)
- Name and location of the relevant educational establishment (e.g. Boston College)
- Country in which the educational institute is located

Note that the system checks the applicant or employee's certificate against the type of educational establishment attended to make sure they match up.

In addition, you can enter the duration of study and the applicant/employee's major and minor courses of study.

Note that the system checks the applicant or employee's major and minor courses of study against the type of educational establishment attended to make sure they match up.

If you have made the appropriate system settings, the system automatically determines the appropriate educational group for the educational details you entered. The educational group structures the employee/applicant's education types into different groups.

Contract Elements (0016) Infotype

Definition

You can store all of an employee's employment contract-related data in the *Contract Elements* (0016) infotype.

Use

In *Recruitment*, you can store information on an applicant's employment contract. For the main part, you use the Contract Elements (0016) [Seite 1285] infotype the same way as you do in *Personnel Administration*.

In the *Recruitment* component, the *Contract Elements (*0016) infotype has two additional fields or group boxes:

- **Contractual regulations**

  In *Recruitment*, you can store data on the start of the contract and the work location in the *Contract Elements* (0016) infotype.

- **Planned organizational assignment according to settings**

  You can enter the employee group and employee subgroup that you foresee the applicant belonging to if you hire them.

  Based on the employee subgroup entry you make in the *Contract Elements* (0016) infotype, the system generates the relevant default values for the employee's pay scale assignment in the *Basic Pay* (0008) infotype.

  If you subsequently change the employee subgroup in the *Contract Elements* (0016) infotype, the default values will not be regenerated in the *Basic Pay* (0008) infotype. In this case, you must make the relevant changes in the *Basic Pay* (0008) infotype. This also applies in cases where you create a new record for the *Contract Elements* (0016) infotype.

Integration

When applicant data is transferred to Personnel Administration, the system transfers the entries you made in the contractual regulations and organizational assignment fields as default values.

Applicant Actions (Infotype 4000)

Definition

The *Applicant Actions* infotype (4000) serves as a record of all applicant actions carried out for an applicant. These applicant actions can be:

- Data entry procedures (e.g. *Initial entry of basic data*, *Enter additional data*)
- Procedures that change the overall status of the applicant (e.g. *Reject applicant*, *Put applicant on hold*)

Use

The most important piece of information contained in the *Applicant Actions* (4000) infotype is the applicant's overall status (e.g. *Processing*, *On hold*, *Rejected*). The overall status depends on the last applicant action type performed for the applicant. If, for example, the applicant action type *Put applicant on hold* is performed, the applicant is assigned the overall status *On hold.* In the standard SAP system, a new record is created in the *Applicant Actions* infotype (4000) for every applicant action type performed for an applicant.

In addition to data on the applicant action type that was performed, the *Applicant Actions* infotype (4000) contains information on whether or not an applicant can produce a reference. If this is the case, you can store the name of the employee providing the reference for the applicant in a text not used in evaluations.

The applicant's organizational assignment data is already entered as default values in this infotype. You can overwrite these values.

The time constraint for this infotype is 1.

Applications (Infotype 4001)

Definition

The *Applications* infotype (4001) is used to store information on whether an application was made in response to an advertisement, or is an unsolicited application.

Use

A new data record of the *Applications* infotype (4001) is created for every application received from an applicant. Each record is linked to a specific point in time, that is, the start and end date of the record contain the date on which the application was received.

The time constraint for this infotype is 3.

Vacancy Assignment (Infotype 4002)

Definition

You record the vacancies to which the applicant has been assigned in the *Vacancy Assignment* infotype (4002).

Use

Assign the applicant to a vacancy. The applicant will then be included in the selection procedure for this vacancy. The applicant's vacancy assignment status shows where the applicant is in the selection procedure.

You can assign one applicant to the selection procedures for several vacancies. If you do this, you have to assign different priorities to the vacancy assignments. There must also be a vacancy assignment status for each assignment for the applicant.

The time constraint for this infotype is 2.

Applicant Activities (Infotype 4003)

Definition

You use the *Applicant Activities* infotype (4003) to enter the activities that have been created for an applicant.

Use

Activities carried out for an applicant within a selection procedure are entered, logged and planned in the *Recruitment* system by means of **applicant activities**. In other words, applicant activities are administrative stages through which an applicant passes during the course of the application procedure. Correspondence with applicants is also handled by means of applicant activities.

You can only display applicant activities in applicant master data (you cannot edit them here). To create or change applicant activities, choose *Applicant activity* → *Maintain*.

The time constraint for this infotype is 3.

See also:

Creating and Changing an Applicant Activity [Extern]

Applicant's Personnel Number (Infotype 4005)

Definition

You use the *Applicant's Personnel Number* infotype (4005) to enter an internal applicant's personnel number.

Use

The system enters this number automatically in the corresponding *Applicant's Personnel Number* infotype (4005) for all internal applicants. This means that it contains a data record for each internal applicant.

The time constraint for this infotype is B.

Employee’s Applicant Number (Infotype 0139)

Definition

Store employees' applicant numbers in the *Employee’s Applicant Number* infotype (0139).

Use

Use the *Employee's Applicant Number* (0139) infotype in *Personnel Administration* in the following cases:

- An external applicant enters the company as an employee.
- The internal applicant who is already a company employee occupies the vacant position

Store the employee's applicant number and personnel number in the infotype. The applicant is thereby identified in the *Employee's Applicant Number* (0139) infotype.

Status of Applicant Activity (Infotype 4004)

Definition

The *Status of Applicant Activity* (4004) infotype is a technical infotype that stores the status of the activities you have performed for the applicant.

Use

One *Status of Applicant Activity* (4004) infotype record exists in the system for each applicant. This is created and updated automatically by the system.

You should not edit the *Status of Applicant Activity* (4004) infotype. The infotype displays the status of performed activities and supports you in effective searches for applicant data.

BC - Organizational Management

About the Object Infotype (1000)

Definition

Infotype that determines the existence of an organizational object.

Use

As soon as you have created an object using this infotype, you can determine additional object characteristics and relationships to other objects using other infotypes.

To create new objects you must:

- Define a validity period for the object
- Provide an abbreviation to represent the object
- Provide a brief description of the object

The validity period you apply to the object automatically limits the validity of any infotype records you append to the object. The validity periods for appended infotype records cannot exceed that of the *Object* infotype.

The abbreviation assigned to an object in the system renders it easily identifiable. It is helpful to use easily recognizable abbreviations.

You can change abbreviations and descriptions at a later time by editing object infotype records. However, you cannot change an object's validity period in this manner. This must be done using the *Delimit* function.

You can also delete the objects you create. However, if you delete an object the system erases all record of the object from the database. You should only delete objects if they are not valid at all (for example, if you create an object accidentally).

About the Relationship Infotype (1001)

Definition

Infotype, which defines the *Relationships* between different objects.

Use

You indicate that a employee or user holds a position by creating a relationship infotype record between the position and the employee or user. Relationships between various organizational units form the organizational structure in your enterprise. You identify the tasks that the holder of a position must perform by creating relationship infotype records between individual tasks and a position.

Creating and editing relationship infotype records is an essential part of setting up information in the *Organizational Management* component. Without relationships, all you have are isolated pieces of information.

You must decide the types of relationship records you require.

> You must manually create relationship records when you work in *Infotype Maintenance*. However, when you work in *Simple Maintenance* and *Structural Graphics*, the system creates certain relationship infotype records automatically.

Structure

There are many types of possible relationships between different objects. Each individual relationship is actually a subtype or category of the *Relationships* infotype.

Certain relationships apply only to certain objects. When you create relationship infotype records, you must select a relationship that is suitable for the two objects involved. For example, a relationship that can be applied to two organizational units might not make any sense for a work center and a job.

> The report RHRLAT0 (Allowed relationships of object types) reports on the relationships permitted for particular objects. The *Relationship* infotype screen also includes an *Allow Relationships* option. When this is chosen, a dialog box displays a list of suitable relationships.

Organizational Management includes a predefined set of relationships. You can select from these, or you can create other relationships. For further information, see the Implementation Guide (IMG) under *Organizational Management* > *Integration* > *Basic Settings* > *Infotype Maintenance*.

You can create and edit numerous relationship records for a single object. An organizational unit can be related to several different organizational units, with a position, for example, as well as a work center.

Integration

The benefit of defining relationship records lies in the reporting results which you obtain when you report on particular relationships between objects in an organizational plan.

This happens as follows:

1. When you start a report, you enter a chain of relationships or a certain number of relationships in which you are interested, for example *Organizational unit* > *Position* > *Employee.* This chain of relationships is known as an **Evaluation path**.
2. The system then traces the different structures in your plan, and reports on all objects that are involved in the named evaluation path.

About the Description Infotype (1002)

Definition

Infotype containing descriptions of organizational objects.

Use

The information you store in this infotype is for reference only and can not be reported on. For this reason, the creation of the infotype is optional, it can, however, be very helpful.

In this infotype, you can describe the main area of responsibility of an organizational unit in your enterprise as follows: *Production department is responsible for materials, stockkeeping, packing and distribution*. You can also provide a work center with certain rules and instructions.

You must categorize the infotype records that you create in this infotype. You can do this by assigning subtypes. *Description* subtypes are user-defined and so can vary from company to company. You can, for example, categorize descriptions as general, environmental, or technical. For more information, see the Implementation Guide (IMG) for *Organizational Management*.

You can maintain numerous *Description* infotype records for one object, perhaps a general description record, a technical record, and so on. You can also create records in different languages.

The *Description* infotype should **not** be used as a means of entering job or position descriptions. Job and position descriptions consist of a list of tasks the holder of a job or position must perform. Create these types of description by creating jobs, positions and tasks and relationships between them.

Department/Staff (Infotype 1003)

Definition

Infotype, with which you can allocate a staff indicator to organizational units and positions as well as flag organizational units as departments.

Use

You use the *Department/Staff* infotype solely for organizational units and positions. It has the following functions:

- It allows you to apply a **Staff** flag to organizational units and positions

  A staff flag indicates that an organizational unit or position is not part of the normal reporting structure at your company, but rather reports directly to a high level position, or organizational unit.

- It allows you to apply a **Department** flag to organizational units

  It is necessary to apply department flags only when integration is active between *Personnel Planning* and *Personnel Administration*. If integration is active, certain data records from Personnel Planning are written to Personnel Administration. For this, you must enter which departments are represented by organizational units so that the corresponding data is transferred. (Organizational units do not necessarily represent departments in Personnel Planning. Units may represent teams, or groups, within a single department.)

  If your company uses department flags, you must also make entries in table T77S0, by entering PPABT PPABT for the flags to operate properly. For further information, see the Implementation Guide (IMG) under *Organizational Management* > *Integration* > *Set Up Integration with Personnel Administration*.

You do not have to create this infotype. You can maintain this infotype using *Infotype Maintenance*, by creating infotype records one object at a time. Or, you can work in *Simple Maintenance*, where procedures are streamlined. See Further Attributes [Extern]

If you want to create this infotype, you can run reports, which list all objects with the staff indicator. The RHXSTAB0 report (Staff Functions for Organizational Units) lists flagged organizational units, and the RHXSTAB1 report (Staff Functions for Positions) lists flagged positions.

About the Character Infotype (1004)

Definition

Infotype with which you can categorize the different tasks you maintain in your task catalog. For example, you can differentiate between tasks that contribute directly to the products and services your company produces, and tasks that are administrative in nature.

Use

The *Character* infotype is only used when you work with tasks, within the context of *Human Resources* (HR). (Tasks are also used in *SAP Business Workflow*.) It is not mandatory that you create and edit this infotype. The information contained in the infotype can, however, be useful if you want to determine salaries for jobs and positions, for example. An awareness of the nature of tasks which have to be carried out helps you determine suitable compensation. Do decisions have to be made, for example? Will a task directly help the company to reach its targets?

Tasks can be divided into the following categories:

- Rank
- Phase
- Purpose

You decide how many of these categories are appropriate for your company. You interpret the meaning of the different categories as you see fit. The system interpretation of the different categories (outlined below) is a suggestion only.

If you create this infotype, you can start reports, which will list the characteristics of tasks. The report RHXIAW04 (*Character of a task in an organization*) lists all the characteristics of tasks in one or more organizational unit. The report RHXIAW05 (*Character of individual tasks*) lists the characteristics of single tasks.

Structure

Rank

Use this category to classify tasks as a planning, or completion, or control task.

Phase

Use this category to classify how tasks fit into a business process.

Purpose

This category allows you to identify tasks that directly contribute to the products or services that a company provides.

About the Restrictions Infotype (1006)

Definition

Infotype with which you can identify any restrictions applicable to employees who are assigned to a work center.

Use

You only create a *Restrictions* infotype for work centers.

- Has no wheelchair access, it may be unsuitable for disabled employees
- Requires heavy lifting, it may be unsuitable for women
- Exposes workers to alcohol, it may be unsuitable for employees under 18 years of age

Restrictions are categorized. The different categories of restrictions, and the reasons why the restrictions exist, are user-defined and so may vary from company to company. You can set up restriction categories and reasons in tables T778C and T778X, respectively.

You do not have to create this infotype. However, it can be helpful if such restrictions exist in a work environment, and you want to record them.

There are reports which you can use to report on restrictions for selected work centers, for example, RHXIAW01, (*Single work centers with restrictions*) and RHXIAW00 (*Work centers with restrictions in an organization*).

For the RHXIAW00 report to work, you must create and update relationships between work centers and organizational units, using the *Relationship* infotype (1001).

Vacancy (Infotype 1007)

Definition

Infotype with which you can identify positions which are currently **vacant** or will be vacant in the future, that is, they may be occupied again in the future.

Use

You only create a *Vacancy* infotype for positions. You might create a vacancy record for an occupied position if, for example, you know an employee is taking maternity leave.

You can create a *Vacancy* infotype record for a position that is occupied, or unoccupied.

If your company does not distinguish between occupied and unoccupied positions - that is, you consider all unoccupied positions to be vacant - you can set an indicator rather than maintain the *Vacancy* infotype.

The indicator tells the system to treat all unoccupied positions as vacant. For further information see the Implementation Guide (IMG) under *Organizational Management* > *Functions* > *Activate/deactivate "Vacancy" infotype*).

If your company does distinguish between occupied and unoccupied positions, you must maintain the *Vacancy* infotype.

You can mark vacancy records as historical records, once you no longer need them – that is, once a position is filled. Historical records are maintained in the database, but cannot be changed or used in processing. If you use the *Applicant Management* component, it is helpful to keep a record of vacancies after they are filled.

You can maintain this infotype using *Infotype Maintenance*, by creating infotype records one object at a time. Or, you can work in *Simple Maintenance*, where procedures are streamlined. See Further Attributes [Extern]

Integration

The *Vacancy* infotype is used by more than one *Human Resources* component. For example, if you use *Personnel Cost Planning*, the system can take vacancies into account when it calculates cost projections. Vacancies are also registered in *Career and Succession Planning*, where, for example, they can be used when you conduct a search for suitable positions for an employee. If integration with the *Personnel Administration* component is active, the *Applicant Management* component also checks vacancy records. It is not mandatory to create the *Vacancy* infotype for *Organizational Management* purposes. You should, however, create this infotype for positions if you want to install the following HR components: *Personnel Cost Planning, Career and Succession Planning* or *Applicant Administration*.

See also:

Personnel Cost Planning [Extern]

Account Assignment Features (Infotype 1008)

Definition

Infotype with which you can define account assignment features for organizational units and positions.

- It plays a role in the assignment of cost centers to objects.

  You need cost center assignments if you plan to use the *Personnel Cost Planning* component.

- It allows you to enter default settings helpful for the *Personnel Administration* component.

  This ensures a more efficient integration of the *Organizational Management* and *Personnel Administration* components.

Use

You can maintain this infotype using *Infotype Maintenance*, by creating infotype records one object at a time. Or, you can work in *Simple Maintenance*, where procedures are streamlined.

Cost Center Assignments

Using this infotype, you can specify cost center-related default settings for organizational units and positions. These default values ensure that the system suggests the correct cost center assignment for objects. We recommend that you set default values in order to prevent incorrect data being entered on persons.

Cost centers are determined according to a **combination** of different pieces of information, including business areas, company codes, and so on. By setting defaults for these items, you narrow down the number of cost centers that can be assigned to an object.

The principle of inheritance applies to account assignment defaults. For example, the defaults set for an organizational unit are inherited by subordinate organizational units, as well as by positions assigned to the organizational units.

If you do not want to set up defaults using the *Account Assignment* infotype, you can enter a single default for all organizational units, in Customizing. Refer to the *Personnel Management* section of the Implementation Guide (IMG).

Personnel Administration Defaults

Using this infotype, you can assign personnel areas to organizational units or positions. Default values for payroll, authorizations and so on are controlled via personnel areas.

The inheritance principle applies to personnel areas. This means that employees automatically inherit personnel areas assigned to organizational units and positions, unless you specify otherwise.

This presents two advantages for *Personnel Administration* users:

- Faster assignment of personnel areas, since you do not have to do this separately for every employee.
- Fewer entry errors, as the system suggests the values to be inherited.

Entering personnel areas presents an additional advantage to customers who are installing the *Organizational Management* and *Personnel Administration* components together. Each personnel area is assigned a company code. Company codes are one of the factors used to determine cost centers. (*Personnel Administration* may require cost center assignments so that payroll charges can be charged back.)

This means if you specify a personnel area, it is not necessary to make any more entries in this infotype.

Integration

If enterprise organization is active in a controlling area, you can only maintain an organizational unit's cost center and company code assignments in Controlling.

The system saves these assignments in *Account Assignment Features* (infotype 1008) in the *Controlling Area* and *Company Code* attributes. However, you can maintain or overwrite the Business Area and Personnel Area attributes of this infotype in Organizational Management, even if enterprise organization is active. See also Enterprise Organization [Extern]

See also:

Personnel Cost Planning [Extern]

About the Health Examinations Infotype (1009)

Definition

Infotype, with which you can create prerequisites and restrictions for employees at particular work centers.

Use

You only create a *Health Examinations* infotype for work centers.

You do not have to create this infotype.

If you create this infotype, the following reports are available, which document work centers with health exclusions or health examinations:

- Report RHXIAW02 (*Work centers requiring health examinations in an organization*)
- Report RHXIAW03 (*Single Work Centers Requiring Health Examinations*)

Structure

Health information is categorized into two subtypes:

- Health exclusions
- Health examinations

> You can add other subtypes, or categories, if required. Refer to the *Personnel Management* section of the Implementation Guide (IMG).

You must assign the information you enter in the *Health Examinations* infotype to a subtype.

Use the *Health exclusion* subtype when employees are restricted from a work center if they have, or have had, a certain ailment. For example, employees who have had TB might be restricted from work centers where food is handled.

Use the *Health examination* subtype when a particular health examination must be performed on a regular basis, for example, if regular eye tests or hearing tests are required.

About the Authorities and Resources Infotype (1010)

Definition

Infotype with which you can define authorities and resources for positions or work centers.

Use

The *Authorities and Resources* infotype is created mostly for positions. You can, however, use it for work centers. This infotype serves two separate purposes. It allows you to identify:

- The authority assigned to a position or work center

  A position can have authority to sign contracts of up to 50,000 dollars- You can also use authorities to set authorizations for access to different areas of your company.

- The resources, or the equipment, made available to positions or work centers

  , including the following:

  – laptops

  – special equipment

  – cars

Save the corresponding data in the subtypes *Authorities* and *Resources*.

If you create *Authorities* and *Resources* infotype records, you must assign information to one of the above subtypes.

You do not have to create this infotype.

You can use report RHXHFMT0 (*Authorities and resources*) to report on the data contained in the infotype.

Work Schedule (Infotype 1011)

Definition

Infotype with which you can define work schedules for organizational units, positions or work centers.

Use

You define planned working times for your organizational units, positions or work centers in order to store the projected volume of work per object. If a position is to be occupied, you can, for example, compare the planned working time stored for the position with the planned working time stored for the employee Infotype 0007 [Seite 107]. In this way, you can avoid unwanted inconsistencies.

- If you want to create a company-wide planned working time, you can do so in Customizing. For more information, see the *Personnel Management* Implementation Guide (IMG) under *Organizational Management → Infotype Settings → Working Time → Maintain Rule Values*. We recommend, however, that rather than creating a working time for the whole company, you create a record for infotype 1011 for the root organizational unit and allow the value to be passed down the hierarchy.
- If you have various working times in your enterprise, create records for infotype 1011 for your organizational objects as you require.
  - You can also use the planned working time stored in Customizing as a default value. You can also specify in Customizing, which of the entry fields you can maintain with daily, weekly, monthly or annual values. For more information, see the *Personnel Management* Implementation Guide (IMG) under *Organizational Management → Infotype Settings → Working Time → Maintain Rule Values*.
  - To save time, you can also define **work schedule groups** as **subtypes** of infotype 1011. These can be created for organizational units. As long as positions are assigned to employee groups/subgroups (Infotype 1013 [Seite 57]), you can group them into work schedule groups and allocate them a working time together. For more information, see the *Personnel Management* Implementation Guide (IMG) under *Organizational Management → Infotype Settings → Working Time → Maintain Working Time Groups*.

In these cases, positions inherit planned working times as follows:

- A record for infotype 1011 exists for a position: this work schedule applies.
- There is neither a record for infotype 1011 nor a record for infotype 1013 for a position: the position inherits the next working time flagged as “general” from a superior organizational unit. If there is no corresponding infotype record, the working time stored in Customizing is used.
- No record for infotype 1011 exists for a position; it is assigned to a combination of employee group and subgroup via infotype 1013. This group is not assigned to a work schedule group: The position inherits, as far as possible, the working time of the ALL subtype or the working time flagged as “general” for the directly superior organizational unit. If neither of these exists, the position inherits the working time from the next highest organizational unit. If none of these working times is found in the whole organizational structure, the working time stored in Customizing is used.

- No record for infotype 1011 exists for a position; it is assigned to a combination of employee group and subgroup via infotype 1013. This group is assigned to a work schedule group: The position inherits, as far as possible, the working time of the subtype (work schedule group) or the working time flagged as “general” for the directly superior organizational unit. If neither of these exists, the position inherits the working time from the next highest organizational unit. If none of these working times is found in the whole organizational structure, the working time stored in Customizing is used.

  If the inherited working time does not cover the entire object period of the position, the position continues to inherit working times until the whole object period is covered.

In these cases, work centers inherit planned working times as follows:

- A record for infotype 1011 exists for a work center: this work schedule applies.
- No record for infotype 1011 exists for a work center. The work center is related to a position for which a record for infotype 1011 does exist: the work center inherits the position’s working time.
- No record for infotype 1011 exists for a work center. The work center is related to a position for which a record for infotype 1011 does not exist: the work center inherits a working time in the same way as a position.

You can maintain this infotype in *Simple Maintenance* or in *Detail Maintenance*.

You can report on working times using the reports RHXSBES0 or RHSBES00 (*Staff assignments*). The report shows work schedules of organizational units, and possibly positions, and employees, depending on the options you select. (If integration is active with *Personnel Administration*, the report also shows absentee statistics, as well as other personnel data, as long as you have the authorization required.)

Structure

A complete record for infotype 1011 includes the following entries:

- the value you entered in the maintainable field
- based on this, the values calculated by the system for the non-maintainable fields
- a percentage that specifies the relationship between the value you entered and the default value stored.

A complete record for infotype 1011 for an organizational unit also includes the following:

- a subtype key, that is the work schedule group
- whether the working time entered for this infotype is to act as a general working time for subordinate objects

If there is more than one work schedule group (subtype) in the organizational unit, then there might be multiple infotype records for a single unit.

Integration

If you have activated integration between *Organizational Management* and *Personnel Administration* in Customizing, when a position is to be newly occupied, the planned working time

entered for the position in infotype 1011 is compared to the planned working time for the employee stored in infotype 0007. The work schedule check must also be activated for the relationship *A/B 008 (Holder)*. For more information, see the *Personnel Management* Implementation Guide (IMG) under *Organizational Management* → *Basic Settings* → *Relationship Maintenance*.

If your company uses *Personnel Cost Planning*, the system can use the work schedule information, together with the information stored in the *Cost Planning* infotype 1015, to perform calculations. See Personnel Cost Planning [Extern]

In the *Organizational Management* component, work schedules are for reference purposes. They are not used to calculate payroll, for example.

You can create more complex work schedules using the *Workforce Planning* component.

About the Employee Group/Subgroup Infotype (1013)

Definition

Infotype with which an employee group and subgroup can be assigned to a position.

Use

The *Employee Group/Subgroup* infotype is an optional infotype and is only created for positions. If you create this infotype and install both the *Personnel Administration* and *Organizational Management* components, you can check both employee and position data in both components. To carry out this check, the employee groups and subgroups must be available in both components.

The system checks that:

- Both the employee assigned to a position, and the position itself, are assigned to the same employee group and employee subgroup
- Work schedules assigned to positions and employee groups/subgroups in *Organizational Management* are consistent with the working times assigned to the holder of the position (the employee) in *Personnel Administration*.

If the system detects an inconsistency, a warning message appears. You can, however, still proceed with activities.

When integration is inactive, this infotype is still relevant, since the system checks employee groups and subgroups when you work with work schedules.

Employee groups and subgroups are user-defined, when *Personnel Administration* is installed. Refer to the *Personnel Administration* section of the Implementation Guide (IMG).

You can maintain this infotype using *Infotype Maintenance*, by creating infotype records one object at a time. Or, you can work in *Simple Maintenance*, where procedures are streamlined.

About the Obsolete Infotype (1014)

Definition

Infotype with which positions that are no longer required as a result of reorganization, but are still occupied can be flagged as **obsolete**. This enables you to recognize instantly if any action is required (searching for new activities for the holders of such positions, for example).

Use

This infotype is typically used for positions, although you can use the infotype with work centers as well.

Integration

You must create this infotype if you wish to install the *HR Recruitment* component. This component checks the system for positions that have been flagged as obsolete so that new positions can be found for the holders of the obsolete positions.

If the holder of an obsolete position is assigned to a new position or leaves the company, the system will ask you to delimit the validity period of the obsolete position.

You can maintain this infotype using *Infotype Maintenance*, by creating infotype records one object at a time. Or, you can work in *Simple Maintenance*, where procedures are streamlined.

Cost Planning (Infotype 1015)

Definition

Infotype with which information on all cost elements that form part of personnel costs in general can be stored.

Use

The *Personnel Cost Planning* component allows you to develop various scenarios for personnel cost targets and projections. The scenarios you develop can later be transferred to *Controlling* (CO) for budget planning purposes.

The *Cost Planning* infotype is only relevant if you use the *Personnel Cost Planning* component of *Human Resources*.

There are three methods you can use to develop different costing scenarios:

- Projected pay
- Payroll results
- Basic pay

The *Cost Planning* infotype is used to create cost planning using projected pay.

You can create this infotype for single jobs or positions. It is, however, also possible to enter the information for work centers or organizational units.

You might append cost data to organizational units and work centers when there is a fixed or lump sum of money that cannot be applied to individual jobs or positions.

The different types of costs are called **wage elements**. You can enter a maximum of seven wage elements for each cost planning infotype record you create. The wage elements themselves are defined in Customizing. Refer to the *Personnel Management* section of the Implementation Guide (IMG).

Structure

For each wage element entry you must identify the:

- Name of the particular wage element
- Amount of the element (either carried over from the Wage Table, or you can enter a different amount)
- Currency
- Time frame (a monthly contribution, a yearly adjustment, and so on)

Integration

Wage elements are referred to as cost elements, once they are brought into *Personnel Cost Planning*.

Cost Planning (Infotype 1015)

See also:

Personnel Cost Planning [Extern]

Standard Profiles (Infotype 1016)

Definition

Infotype with which the following objects may be assigned authorization profiles defined by the system.

- Organizational units
- Jobs
- Positions
- Tasks (or standard tasks, if you have installed *SAP Business Workflow*)

Use

Authorization profiles control the functions/activities that the user can carry out in the system. An authorization profile is a list of authorizations that control access to different areas of the system. Authorities can also dictate the types of infotypes that users work with in the system. The authorities are valid across all system products. (Authority profiles are user-defined, at installation.)

For more information on authorization profiles, see BC - Users and Authorizations [Extern]

Authority profiles are applied to R/3 users on an individual basis, one at a time. If you use the *Standard Profile*, you do not have to assign authorization profiles to employees individually. Instead, the profile to which you have assigned organizational units, jobs, positions, or tasks is transferred automatically to employees that are related to the object concerned. Make these assignments using report RHPROFIL0 (*Generate user profiles*).

The *Standard Profiles* infotype allows you to specify several authorization profiles in one record.

To restrict the data that is displayed to a user who is working with organizational plans, use the infotype *PD Profile*.

Before you assign standard profiles, you should consider which object type is best suited to the assignment of authorization profiles.

For example, if authority profiles tend to be fairly standard for all workers in an organizational unit, then it may be most effective to apply profiles to organizational units. (Where exceptions occur for jobs or tasks, you can create additional profiles for them.) If, however, authorities vary by job or task, it may be best to apply profiles to the jobs or tasks concerned.

It is important to note that the profile assigned to a task does not cancel out the profile assigned to a position, or job, or organizational unit. One infotype record does not override another. Rather, all profiles that are applied to an object directly or indirectly are considered valid.

Assigning Profiles to Different Organizational Objects

Standard Profiles (Infotype 1016)

If you assign profiles to	Then
Individual tasks	The assignment is automatically passed on to the related positions and jobs. You can add supplementary authorizations to the jobs and positions, if required.
Jobs and positions	You can identify any special (specific) authorities to tasks, if required.
Organizational units	All jobs and positions assigned to the organizational units receive the same authorizations (and employees, if integration with PA master data is active).

About the PD Profiles Infotype (1017)

Definition

Infotype with which structural authorizations can be created and edited.

Use

Structural authorizations control:

- which objects in the organizational plan a user is permitted to display, for example,
  - Organizational units
  - Qualifications and Requirements
  - Business events
- which activities in the organizational plan a user is permitted to execute, for example,
  - create
  - change
  - display

Authorization profiles are set up in Customizing. Refer to the *Personnel Management* section of the Implementation Guide (IMG).

If you are working in the *Organizational Management* component, you must implement safety measures, by creating the *PD Profile* infotype as well as report RHPROFL0 (*Generate user authorizations*) or edit table T77UA.

Since PD profiles only affect access to *Organizational Management*, you must still use the *Standard Profiles* infotype to enter basic authority privileges. Users require a standard profile, for example, to log on to the system.

Structure

A PD profile contains a list of authorizations, and anything listed in the profile is allowed. You may include an unlimited number of authorities in one profile, and you can append PD profiles to the following objects:

- Organizational units
- Positions
- Jobs
- Tasks (or standard tasks, if you have installed *SAP Business Workflow*)

Integration

As a stronger safety measure, install the PD profile as well as the standard profile.

About the PD Profiles Infotype (1017)

Let's assume you only want to display the projected pay for the 'Special administrator' position in the system. (The *Projected Pay* infotype is assigned to positions).

To set this up, you must create the following:

- a Standard Profile infotype record for the position 'Special administrator' which allows the position holder to display records from the *Projected Pay* infotype.
- a PD Profile infotype record for the position 'Special administrator' which allows the position holder to display positions.

About the Site Dependent Info Infotype (1027)

Definition

Infotype with which a calendar can be related to an organizational unit.

Use

Days on which there is no work are defined in the calendar. Examples of such days are

- Civic or religious holidays
- Any nonworking day unique to a company

For *Organizational Management* purposes, it is not mandatory to maintain the infotype there, since calendar data provides information only.

However, the *Training and Event Management* and *Shift Planning* components of HR do require this information. These modules check calendars, to ensure business events and shifts are planned for days when businesses operate. If you plan to use *Training and Event Management* or *Shift Planning*, you must provide calendar information.

A default factory calendar must be set for these two modules. For *Training and Event Management*, maintain the entry **SEMIN ORTCA** in table T77S0. For *Shift Planning*, maintain the entry **PEINS CALID** in the same table. (Refer to the *Personnel Management* section of the Implementation Guide (IMG).)

The *Site Dependent Info* applies only to organizational units and locations whose calendars differ from the default. Use the infotype to identify the correct calendar for the organizational unit, or location, in use.

About the Address Infotype (1028)

Definition

Infotype, with which addresses of companies or external trainees as well as information on the location of organizational objects and resources can be stored.

Use

In *Organizational Management*, maintain this infotype for

- Organizational units
- Work Centers
- Positions

The information is for reference purposes only. The infotype is optional.

In *Training and Event Management*, maintain the infotype for

- Business event locations
- Room resources
- External trainees and trainers
- Companies

The Address infotype maintained for the business event location is used in correspondence for notifications such as confirmations of registration, confirmations of attendance. By using a variable in the correspondence, you can control whether the first or second address is to be given.

This infotype must be created for companies or for external attendees and trainers (object type *External Person*).

Structure

To complete the *Address* infotype for locations of rooms, enter the following data:

- Name of building
- Room number

Addresses of buildings are created separately. To maintain addresses of buildings for the purposes of room location information, you must have completed the step Set Up Building Address [Extern] in Customizing for *Training and Event Management* or in *Current Settings*.

The following information is also maintained for addresses:

- Telephone number
- Fax number
- 2nd Address line

- Street, House number
- Postal Code, City
- Country key
- Region
- Distance in kilometers

You can store various addresses by creating subtypes. The following subtypes are set up in the SAP Standard system:

Subtype blank: *1st Address*

Subtype 0001: *2nd Address*

About the Mail Address Infotype (1032)

Definition

Infotype with which data for message transfer can be created.

Use

The infotype contains details required for the electronic transmission of information, for example, user IDs. You maintain this data for various objects, for example

- Organizational units
- External employees
- Companies

When something happens relating to a reservation – for example, if there is a cancellation – the system checks for all objects involved in the event (the participants, organizers, and so on) and sends notifications.

For *Room Reservation Planning* purposes, you might define this infotype for the organizational units designated as event organizers, companies, and external persons. However, Customizing allows you to determine the objects to which this infotype applies. Refer to the *Personnel Management* section of the Implementation Guide (IMG).

Structure

When creating this infotype, you must identify the:

- Name of the electronic mail system used

  (At present, the system supports only the SAP mail system.)
- User ID of the employee responsible for coordinating mail communications in the organizational unit, or company, or work center
- User ID of the external employee, or position holder
- Owner or creator of the distribution list for the organizational unit, or company, or work center

If you are working with an external employee, or position, this information is not required.

Integration

This infotype is not usually set up in the Organizational Management component. There are, however, exceptions. If your company does not use a SAP mail system, you can use this infotype to store information about mail addresses, for positions, or work centers. However, in this case, the information is for reference purposes only. The system cannot do anything with the data.

The Sales Area Infotype (1037)

Definition

Using the *Sales Area* infotype, you can enable the component *Sales and Distribution* (SD) generate invoices and receive payment for business events.

Use

The infotype is only relevant if you use the *Training and Event Management* component, as well as SD. Using this infotype, you can attribute the revenue earned from business events to SD sales areas.

Sales areas are used to group together products or services whose sales can be handled in the same way.

Integration

You can apply this infotype to organizational units in *Organizational Management*, or to business event types in *Training and Event Management.*

In *Organizational Management*, you append the infotype to the organizational unit designated as the organizer of a given business event.

In *Training and Event Management*, you append the infotype to business event types. You use this method when the organizer of a business event varies according to the type of business event you are using.

In either component, you must provide three pieces of information to specify a sales area:

- The sales organization code that represents a sales organization responsible for a given product
- The distribution channel code that indicates how products or services reach a customer (for example, wholesale, retail, or direct sales)
- The division code, a way of categorizing products or services into product lines

Using this infotype, you can attribute the revenue earned from business events to SD sales areas.

Sales areas are used to group together products or services whose sales can be handled in the same way.

About the Shift Group Infotype (1039)

Definition

Infotype with which a shift group can be assigned to an organizational unit.

Use

The *Shift Group* infotype is only used for organizational units and is only used if you are using the *Shift Planning Human Resources* Component.

A shift group is a collection of individual shifts. For example, a shift group might include the following three shifts:

Shift name	Hours worked
Early shift	6 a.m. to 2 p.m.
Afternoon shift	2 p.m. to 10 p.m.
Midnight shift	10 p.m. to 6 a.m.

Shift groups are user-defined, so the actual content of a shift group – the number of shifts and the hours worked – can vary. The shift groups themselves are defined in the *Shift Planning* component of HR.

By assigning shift groups to an organizational unit, you determine the shifts that will be worked in the organizational unit. The characteristics of the shift group, the requirements type, for example, are passed on to the organizational units.

The system uses this information for cross-checking purposes, to ensure the shift plans you set up include the correct shifts and requirement types for each organizational unit you use.

You can only assign one shift group to an organizational unit, at any given time. However, one shift group can be assigned to many different organizational units.

Integration

Shift group assignments can be carried out in the *Shift Planning* and *Organizational Management* components of HR.

Refer to the *Personnel Management* section of the Implementation Guide (IMG).

SAP Organizational Object (Infotype 1208)

Definition

Infotype with which relationships between SAP organizational objects [Extern] and objects from Organizational Management (organizational units, positions, jobs and work centers) can be created and edited.

Use

These relationships (or assignments) are relevant only for *SAP Business Workflow* customers who are using roles [Extern] to identify agents for the individual tasks in a workflow. See SAP Business Workflow [Extern]

Integration

There are two areas where you can work with these types of assignments:

- By using this infotype in *Infotype Maintenance* in *Organizational Management*

  This is not recommended.

- By using the Assignment of *SAP Organizational Objects* transaction

  This is recommended. See Assigning SAP Organizational Objects [Extern]

PT - Personnel Time Management

Shift Planning

Shift Group (Infotype 1039)

Definition

The *Shift Group* infotype (1039) is only used for organizational units and is required if you want to implement the *SAP Shift Planning* component.

This infotype enables you to assign a shift group to an organizational unit.

A shift group consists of a collection of separate shifts. For example, a shift group could contain the following three shifts:

Shift Description	Working Hours
Early shift	6:00 a.m. to 2:00 p.m.
Afternoon shift	2:00 p.m. to 10:00 p.m.
Night shift	10:00 p.m. to 6:00 a.m.

Shift groups are user-defined, that is, the content of a shift group — the number of shifts and the working hours — varies from shift group to shift group. The shift groups themselves are defined in the *SAP Shift Planning* component.

Use

By assigning a shift group to an organizational unit, you determine the shifts to be worked in a specific organizational unit. The characteristics of a shift group, such as the requirements type, are also attributed to the organizational units.

The system uses this information to check if the shift groups created contain:

- The correct shifts, and
- The correct requirements types

  for each organizational unit being edited.

An organizational unit can only be assigned to one shift group. A specific shift group, however, can be assigned to several different organizational units.

You assign shift groups in the *SAP Shift Planning* component.

For more details on creating shift plans, see the Implementation Guide (IMG) for *Shift Planning*.

Time Recording

Absences (Infotype 2001)

Definition

Absences are times when employees are not at work. Employees are absent if their planned working time, as stipulated in their work schedules, is not fully worked. Types of absences include:

- Leave
- Illness
- Health spa
- Lateness

Use

National Features

Country-specific features must be taken into account for some absence types. You can either enter these absence types in the *Absences* infotype (2001) or in special types of infotypes:

- Maternity Protection infotype (0080) [Seite 111]
- Military Service infotype (0081) [Seite 112]

You can also use various infotypes to store country-specific features for recording incapacity to work for Germany, France, the Netherlands, Austria, and Great Britain/Ireland. These are:

- Absences (Infotype 2001): National Features for Germany [Extern]
- Absences (Infotype 2001): National Features for France [Extern]
- Absences (Infotype 2001): National Features for the Netherlands [Extern]
- Absences (Infotype 2001): National Features for Austria [Extern]
- Absences (Infotype 2001): National Features for Great Britain/Ireland [Extern]

Structure

Absences are divided into absence types. An absence type is a subtype of the *Absences* infotype (2001).

Absence groups

The *Absences* infotype (2001) includes a special feature: Various entry screens for subtype groups are activated. These screens enable you to enter specific data for each absence. The standard R/3 System includes entry screens for:

- ***For general absences***

  This entry screen is used for all absences that do not require any special processing (that is, special leave for relocation). The system displays payroll hours and days on this screen.

- ***For absences with quota deduction***

This entry screen can be used for the *Leave* and *Time off for overtime* leave types. It has special fields and additional screens which allow you to check the quota deduction. When you enter an absence type with quota deduction, the system checks the existing quotas. The absence record can only be stored if sufficient quotas are available. If sufficient quota is available, the system updates the quotas automatically. In Customizing you determine which absence types you want to be deducted from which absence quota types.

- For absences relating to an incapacity to work

  This screen is used for all absence types that are related to automatic continued pay. The screen includes special fields and additional subscreens to store and check data for continued pay and sick pay supplements. The system also displays payroll hours and days here.

Clock times or a number of hours

Depending on the settings in Customizing, absences can be recorded with clock times (that is, 10:00 a.m. - 12:00 p.m.), or by specifying a number of hours only (that is, 2 hours).

Whether you record hours or clock times for an employee depends on the following:

- Employee's *Time Management status* in the *Planned Working Time* infotype (0007)
- Work schedule rule assigned to the employee in the *Planned Working Time* infotype (0007)
- Employee's assigned personnel area, subarea, and so on in the *Organizational Assignment* infotype (0001)

Whether or not the system generates clock times automatically also depends on the settings made in Customizing.

Contact your system administrator about the regulations that apply to absence recording in your enterprise.

Default Values for Absences

When you enter absence types, the system automatically calculates the number of absence days. The employee's planned working time, as well as any days off, are taken into account.

Depending on settings made in Customizing, either a warning or error message is displayed if the begin or end date, or validity period, of an absence record falls on an employee's day off.

Integration

You can use the *Absences* infotype (2001) to transfer costs and work performed data to the *R/3 Accounting* and *Logistics* components.

See also:

Maintaining Partial Day Absences [Extern]

Maintaining General Absences [Extern]

Maintaining Absences with Quota Deduction [Extern]

Absences (Infotype 2001)

Maintaining Incapacity to Work in the Absences Infotype (2001) [Extern]

Attendances Infotype (2002)

Definition

You can use the *Attendances* infotype (2002) to store special attendances for employees.

In the *Human Resources (HR)* component, you can record attendances that define or add to an employee's monthly work schedule.

A typical attendance is a business trip. The employee is not at his or her normal workplace, but nonetheless is still working for the enterprise.

Attendances are divided into attendance types. Attendance types are subtypes of the *Attendances* infotype (2002).

Use

The *Absences* infotype (2001) also includes a special feature: Various entry screens for subtype groups are activated. These screens allow you to enter special data for these attendances. The standard R/3 System includes entry screens for:

- General Attendances

  This entry screen is used for all absences that do not require any special processing (business trips, for example). Payroll hours and days are also displayed here.

- Attendances with Quota Deduction

  This entry screen can be used for the *Attendance For Quota Days* attendance type. In addition, the screen includes special fields and additional subscreens to check quota deduction.
  When you enter an attendance type with quota deduction, the system checks the existing quotas. The attendance record only be stored if sufficient quotas are available. The system automatically updates the quotas.
  In Customizing, you can define the attendance quota types from which a particular attendance type is to be deducted.

When you enter attendance types, the system automatically calculates the number of attendance hours and days, taking the employee's planned working time and days off into account.

You can overwrite the *Hours* fields. Unlike absence times, attendance times can extend beyond an employee's daily planned working time.

Depending on the settings made in Customizing, absences can be recorded with clock times (that is, 10:00 a.m. - 12:00 p.m.), or by specifying a number of hours only (that is, 2 hours).

Whether you record hours or clock times for an employee depends on the following:

- Employee's *Time Management status* in the *Planned Working Time* infotype (0007)
- Work schedule rule assigned to the employee in the *Planned Working Time* infotype (0007)

- Employee's assigned personnel area, subarea, and so on in the *Organizational Assignment* infotype (0001)

  Whether or not the system generates clock times automatically also depends on the settings made in Customizing.

  Contact your system administrator to find out which regulations apply to the absence recording in your enterprise.

Payment Data

There are two methods of entering a payment that differs from an employee's normal payment resulting from a particular attendance in the system:

- Wage Type

  You can enter the payment for an attendance directly in the *Wage type* field. This field can then be queried in Payroll or Time Evaluation. This field is not used in the standard R/3 System.

- Different payment

  Choose *Goto* → *Different payment* to enter information for a different payment.

  – Assign a premium

  – Re-define a payment by assigning a pay scale group and level

  – Control payment by entering a different position

  – Add or deduct a specific amount using the "Extra pay indicator" and the "Valuation basis."

Integration of Data With Other R/3 Components

You can use this infotype to transfer data on costs and work performed to *R/3 Accounting* and *R/3 Logistics*.

See also:

Maintaining General Attendances [Extern]

Maintaining Attendances with Quota Deduction [Extern]

Substitutions Infotype (2003): Changes to Planned Working Time

Definition

A substitution is generally understood to be a temporary replacement for an employee who is absent. In the business world, a substitution also means assigning another person to take over the position and associated tasks of an absent colleague.

The term *substitution* is interpreted even more broadly in *SAP Human Resources* (HR). A substitution is not only the temporary replacement of an absent employee, but most importantly, involves a change to the employee's planned working time.

Use

The *Substitutions* infotype (2003) includes the following functions:

- Assigning planned working times that deviate from those specified in the employee's personal work schedule.

  Example: During a certain period, an employee is required to perform tasks that involve a different working time.

- Different cost assignment

  Example: An employee is required to perform a task involving costs that are not assigned to his or her master cost center.

- Assigning an employee to a different position for a certain period of time.

  Example: An employee with a *Machine Inspection* position substitutes for someone whose position is *Warehouse Management*.

- Example: You can assign a different payment for a temporary activity based on an existing position.

  An employee is temporarily assigned an activity that is subject to a higher rate of payment. You assign this employee to a position with a higher payment for the applicable period.

Types of Substitution

Except for position substitutions, all types of substitution constitute a change to the employee's personal work schedule, as the system overwrites the original work schedule when you enter a substitution. Therefore, on any one day, the system can only take one substitution into account that changes the employee's planned working time.

By combining a position substitution with other substitution types, you can change both the employee's planned working time **and** payment details.
To prevent errors, you can set up an appropriate collision check in the corresponding Customizing steps in the Implementation Guide (IMG).

The following types of substitutions are available for recording substitutions.

Substitutions Infotype (2003): Changes to Planned Working Time

Substitutions Based on a Daily Work Schedule

Use this function to enter deviations in your employee's work schedule that occur on a daily basis.

Use this substitution type instead of the substitution based on a work schedule rule if an employee is to be assigned a different work schedule for a short period of time only (one day, for example).

Substitutions Based on a Work Schedule Rule

Use this function to enter deviations in the employee's personal work schedule that last for several days.

This function is useful for temporarily assigning a different personnel subarea grouping, employee group or public holiday calendar to an employee.

Substitutions Based on Another Employee's Work Schedule Rule (Personnel Number Substitution)

Use this function to change your employee's work schedule rule by assigning him or her another employee's personnel number. The other employee's work schedule rule is now assigned to this employee.

This function is useful if an employee replaces an absent colleague over a fixed period, for example, or is to be assigned the same work schedule rule as another employee.

The employees performing the substitutions in this infotype are not automatically given the same authorizations assigned to the employee who is temporarily being replaced.

Substitutions Based on an Individually Defined Daily Work Schedule (Time Substitution)

Use this function to enter any kind of deviation to the employee's planned working time. You can do this by specifying the start and end of working times and breaks for each day of the substitution.

Use this function if your substitution is not based on either a specific daily work schedule or a work schedule rule.

Substitution Based On A Position

Use this function to specify a different payment for an employee over a certain period of time, based on the specifications for a different position. You can do this by assigning the position with the applicable rate of payment to the employee.

If you only enter the position, the planned working time does not change. The system does not overwrite the original planned working time of the employee performing the substitution.

You can combine the substitution based on a position with all other types of substitution, enabling you to take advantage of other variations of the substitution.

When recording both a position substitution and a time substitution, you can also specify a different payment for the time interval.

An employee in your enterprise takes over a foreman's tasks on January 1, 1997, for a certain number of hours. The employee has a planned working time of 8:00 a.m. to 5:00 p.m. If you enter a combination of time substitution and position substitution from 8:00 a.m. to 12:00 p.m., the employee is paid a foreman's wages for these four hours, and then his or her normal wages from 12:00 noon to 5:00 p.m.

Payment Data

In addition to a substitution based on a position, there are two other methods of entering a different payment that results from a substitution in the system:

Substitution Type

The system enters a substitution type as a default value. You can overwrite this field with another substitution type.

The substitution type can be taken into account in personnel calculation schema *XT00* for payroll.
Only reduced hours substitutions are queried and valuated in time evaluation.

Different Payment

Choose *Goto* → *Different payment* to enter additional information for a different payment.

- Assign an additional premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

Position substitutions and work center substitutions are exceptions in this case.

Availability Infotype (2004)

Definition

You can use the *Availability* infotype (2004) to enter different types of work availability duties. A typical availability type is on-call duty.

In the *R/3 Human Resources* (HR) component, an availability is work performed outside of an employee's planned working time. When you create an availability, the system does not overwrite the employee's work schedule.

Availability types are subtypes of the *Availability* infotype (2004). The standard R/3 System includes the following availability types:

- Subtype 01: *On-call duty*
- Subtype 02: *On-call duty <=10%*
- Subtype 03: *On-call duty <=25%*
- Subtype 04: *On-call duty* <=40%
- Subtype 05: *On-call duty <=49%*

Use

Availability Types

Availability Based On Fixed Times

Use this type of availability for employees who are to be available during a specify time interval or within a certain period of their planned working time.

You want to create the following availability:

- Monday from 8:00 a.m. to 4.00 p.m.
  Specify the availability time as 8:00 a.m. to 4:00 p.m. on the desired date.
- Monday from 8:00 a.m. to 4:00 p.m.and Tuesday from 8:00 a.m. to 4:00 p.m.
  Create a data record with a time interval from 8:00 p.m. to 4:00 p.m. for Monday and Tuesday.
- Monday 8:00 a.m. to Tuesday 4:00 p.m., continuous
  Create a data record for the desired period from Monday through Tuesday. To do so, you must define start and end times.
  The data record starts Monday at 8:00 a.m. and ends on Tuesday at 4:00 p.m.

Availability Based on a Daily Work Schedule

Use this availability type for planned working times or availability times stipulated in the daily work schedule. Unlike *Availability Based on Fixed Times*, these times may overlap those

specified in the employee's work schedule. In this way, you can enter an availability that is valid during an employee's normal working time.

For this availability type, you can only use the daily work schedules that you have defined as permitted in the corresponding Customizing steps in the Implementation Guide (IMG).

Availability Based on a Work Schedule Rule

Unlike the *Availability Based on a Daily Work Schedule*, you use this availability type if you want to take into account the work cycle specified in the period work schedule. The times of this availability type may also overlap the work schedule.

For this availability type, you can only use the daily work schedules that you have defined as permitted in the corresponding Customizing steps in the Implementation Guide (IMG).

Payment Data

There are two ways of entering a different payment resulting from an availability in the system:

- Availability type

  Availability types are subtypes of these infotypes. The availability types can be queried and valuated in *R/3 Payroll*.

- Different payment

  1Choose *Goto* → *Different payment* to enter additional information for a different payment for the availability.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

Integration of Data with Other R/3 Components

You can use this infotype to transfer data on costs and work performed to *R/3 Accounting* and *R/3 Logistics*.

Overtime Infotype (2005)

Definition

You can use the *Overtime* infotype (2005) to enter hours worked in addition to the employee's planned working time specified in the daily work schedule.

The *Overtime infotype* (2005) is normally used if *Time Evaluation is not implemented*. Time evaluation evaluates overtime automatically.

In certain cases, you can use this infotype to enter the overtime hours for which an employee is to receive different payment, even if you do use time evaluation. These overtime hours may not be entered in the system from a time recording terminal.

This option is not supported in the standard R/3 system. If you want to use this function, it has to be activated in time evaluation.

Use

The system calculates overtime hours on the basis of the daily work schedule assigned to the employee. Therefore, times within an employee's planned working time are not taken into account when overtime records are created.

You can specify overtime rules for flextime work schedules in Customizing.

If overtime breaks are defined in the daily work schedule, the system automatically transfers this information to the *Overtime* infotype. These breaks can also be defined individually.

Payment Data

There are two ways of entering a different payment resulting from an overtime in the system:

- Overtime and Overtime Calculation Type

  Overtime records are evaluated in time evaluation or payroll. The wage types or time bonuses generated depend upon:

  - Public holiday class
  - Length of overtime
  - Whether the employee worked on a Sunday
  - *Overtime Calculation Type* entered in this infotype or in the Attendance Quotas infotype (2007) [Seite 98].

- Different payment

  Choose *Goto* → *Different payment* to enter additional information for a different payment for the overtime.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level

- Control payment by entering a different position
- Add or deduct a specific amount using the “Extra pay indicator” and the “Valuation basis.”

Integration of Data With Other R/3 Components

You can use this infotype to transfer data on costs and work performed to R/3 *Accounting* and *Logistics*.

See also:

Maintaining Overtime [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Events Infotype (2011)

Definition

In the HR system, time events are clock-in/out times, entries for off-site work, and so on, which are normally recorded by employees at the time recording terminal. If an employee has forgotten to clock in or out or if an entry is incorrect, you can use this infotype to create, correct, or delete the time events manually.

Use

Infotype 2011 is used only for time evaluation.

> Missing clock-in or clock-out times are automatically supplemented in time evaluation in certain cases. The system determines the missing times on the basis of the employee's planned working times.

Time events can only be recorded for employees who take part in time recording. This must be specified in the Planned Working Time [Seite 107] infotype (0007). The employee must also be assigned an authorization for the required time event types in the Time Recording Information [Seite 109] infotype (0050). Time event types can be clock-in/out times for normal attendances, off-site work, and so on.

See also:

Maintaining Time Events [Extern]

Time Transfer Specifications Infotype (2012)

Definition

Time transfers allow you to make changes to the time balances that have been calculated in time evaluation. This means that in exceptional cases you can change the results of time evaluation online.

- An employee has a flextime credit of five hours. These should be transferred to the compensation time account.
- Three hours should be transferred from the employee's absence quota to his or her flextime balance.
- An employee's flextime balance should be reduced by five hours.

Use

The time transfer types that you can use are defined in the Customizing system.

You can select a time transfer type, to define whether the specified number of hours:

1. Is posted to a wage type

   If the flextime balance contains more than 5 hours, the excess hours should be remunerated.

2. Sets a time type (for example, the flextime balance) to a fixed value, that is, the time balance of a time type is set to the specified number of hours.

   The balances formed in time evaluation are updated in the time types.

   The flextime balance is set to a fixed value of ten hours. The employee should be remunerated for any excess hours.

3. Is posted to one or several time types, that is, increases or reduces the time balance of a time type.

   The accumulated compensation time is transferred to the flextime balance. The flextime balance is increased or reduced by the specified number of hours.

4. Is posted to an absence quota [Seite 96]

The name of the time transfer type usually indicates the nature of the changes made.

Time transfer specifications are always made with reference to a specific validity date. If you specify a validity period, the system carries out a time transfer on each day of the period.

Time Transfer Specifications Infotype (2012)

See also:

Maintaining Time Transfer Specifications [Extern]

Time Quotas

Absence Quotas Infotype (2006)

Definition

You use this infotype to manage time accounts that represent employees' absence entitlements or time credits. The time accounts contain a particular number of days or hours, during which time employees are permitted to be off work.

Use

You can use the infotype to manage the following time accounts, for example:

- Employees' annual leave
- Time in lieu accounts, containing hours of overtime for which employees are permitted to claim time in lieu
- Entitlements to paid absences in the case of illness

Structure

Accrual and deduction of absence quotas

Absence quotas can be recorded manually, proposed by the SAP System, or accrued automatically. An employee can claim an absence quota by

- Requesting an absence such as leave

  In this case, you record an absence in the *Absences* infotype (2001). The absence is deducted from the quota. For more information, see Maintain Absences with Quota Deduction [Extern].

- Requesting remuneration for the times

  In this case, you record a compensation. The compensation is deducted from the quota. For more information, see Time Quota Compensation Infotype (0416) [Seite 1296].

When an employee claims time from a quota, the SAP System deducts the requested time from the quota until it is used up. The quota can only be deducted further if the Customizing settings stipulate that the quota can also be deducted up to a particular negative number.

Absence quota type

Absence quotas with an identical content, such as leave, are grouped into an *absence quota type* in Customizing. *Absence quota types* are subtypes of the *Absence Quotas* infotype (2006). Time accounts are managed in hours or days (*Unit* field), according to the absence quota type of the quota from which the absence is deducted.

Validity and deduction period

Absence quotas are only valid for a particular validity period, for example, the leave year or the month in which overtime hours were worked. The deduction period stipulates when a quota can be deducted. The deduction period need not be the same as the validity period.

Employees in your enterprise receive an annual leave entitlement of 20 days. The corresponding absence quota has a validity period of one year. for example, January

1, 2000 to December 31, 2000. The quota has a deduction period from January 1, 2000 to March 31, 2001, that is, employees can take leave up to three months after the end of the leave year.

Time intervals for absence quotas

You assign absence quotas by defining a total entitlement an employee has to an absence for a validity and deduction period. You can specify clock times to stipulate that only partial-day absences within this time frame may be deducted from the quota.

Absence quotas accrued automatically

Absence quotas can be accumulated automatically in time evaluation. You cannot change automatically accrued absence quotas manually in the *Absence Quotas* infotype (2006). Instead, you use the Quota Corrections [Seite 100] infotype (2013).

Recording absences

When you enter an absence with quota deduction or quota compensation, the SAP System checks the existing quotas. The absence record or compensation can only be saved if the employee has sufficient quota.

Time account statuses

To aid data entry when you record absences or compensation, the system displays the absence quotas that can be deducted on the current date, with their deduction period. Additional time account statuses for the absence quota provide information on the current deduction status:

Account status	Meaning
Entitlement	Specifies an employee's total entitlement to an absence entitlement for a particular period, for example, leave/year or compensation hours/month
Remainder	Specifies the available entitlement for which the employee can still deduct absences or have compensated
Requested	Specifies the portion of the entitlement for which absences have been recorded, for past or future dates **Note:** In the Employee Self-Service application *Leave Request,* the *Requested* field specifies the portion of the entitlement for which absences or compensation have been recorded for future dates.
Compensated	Specifies the portion of the entitlement that has already been compensated

You can display an overview of your employees' time account statuses. For more information, see Obtaining Information on an Employee's Absence or Attendance Quotas [Extern] .

See also:

Maintaining Absence Quotas [Extern]

Attendance Quotas Infotype (2007)

Definition

You use this infotype to manage time accounts that represent employees' attendance approvals.

Use

Employees' working times affect costs. You can therefore use the *Attendance Quotas* infotype (2007) to specify how many hours an employee is permitted to work, and at what times. The SAP System monitors how these time accounts are accrued and deducted.

You can use the infotype to manage the following time accounts, for example:

- Approvals for an employee to use a set number of days each year for further training
- Approvals for an employee to work a set number of overtime hours at set times over a set period

Structure

Accrual and deduction of attendance quotas

You record attendance quotas manually for an individual employee, or using fast data entry for a group of employees. When an employee uses an approval, the SAP System deducts the time worked from the account.

Attendance quota type

Attendance quotas with an identical content, such as overtime approvals, are grouped into an *attendance quota type* in Customizing. Attendance quota types are subtypes of the *Attendance Quotas* infotype (2007). Time accounts are managed in hours or days (*Unit* field), according to the attendance quota type of the quota from which the attendance is deducted.

Validity period

Each attendance quota is valid for a particular period. After the validity period has expired, attendances can no longer be deducted from the quota.

Time intervals for attendance quotas

You can also set up attendance quotas for specific clock times. This allows you to assign quotas that can only be deducted at a particular time of day.

Your employees have approval to work overtime from 5:30 p.m. to 7:30 p.m. in July. They are not permitted to work more than 20 hours of overtime in that month, however.

Deduction of attendance quotas

The following attendances can be deducted from attendance quotas:

- Working times recorded in the *Attendances* infotype (2002)

  When you enter an attendance type with quota deduction, the system checks the existing quotas. The attendance record can only be saved if the employee has sufficient quota. The system automatically updates the amount of quota used.

For more information, see Maintain Attendances with Quota Deduction [Extern].

- Working times originating from employees' time postings

  Time evaluation is able to recognize from the employee's time postings whether he or she worked longer one day. It is able to check whether the employee has an appropriate overtime approval.

Attendances are deducted from the attendance quota until the quota is used up. Depending on your Customizing settings, an absence quota can also be deducted into negative numbers.

You can also use this infotype to create a general overtime approval for an employee. You do this by creating an attendance quota of zero hours. In this case, the attendance quota must be deducted automatically be time evaluation.

Remuneration or time in lieu

If you use time evaluation, you can use the *Overtime compensation type* field to control whether overtime is to be remunerated or converted to time off.

See also:

Maintaining Attendance Quotas [Extern]

Quota Corrections Infotype (2013)

Definition

You use this infotype to change accrual entitlements that are generated by time evaluation.

Use

Time evaluation can generate and update records from the *Absence Quotas* infotype (2006) automatically. In the time evaluation run, the system first generates what are known as accrual entitlements. Your Customizing settings determine the time at which the accrual entitlements are transferred as a deductible quota to the *Absence Quotas* infotype (2006).

You can use the *Quota Corrections* infotype (2013) to influence how these accrual entitlements are generated and transferred from the table:

- You can increase, decrease, or replace an accrual entitlement (set to a fixed value).
- You can make the accrual entitlements available for deduction immediately in the *Absence Quotas* infotype (2006).

An employee has joined your company from another company. His or her contract has guaranteed a one-off entitlement of ten days of leave when the employee joins your company. You therefore want to increase the employee's *leave* quota by *10 days*. You want the entitlement to be immediately available in the *Absence Quotas* infotype (2006) so that the employee can take the ten days of leave.

Structure

You can only use the infotype to change absence quotas that are accrued in time evaluation. The changes are taken into account the next time time evaluation is run. Time evaluation carries out a recalculation starting on the day for which you have entered the quota correction. You can view the results of the quota correction in the *Quota Overview* (transaction PT50).

Transfer time

The *Absence Quotas* infotype (2006) does not take account of quota corrections immediately. The infotype is updated at a specific transfer time that is determined in Customizing.

If you want to make the corrected accrual entitlements available directly in the *Absence Quotas* infotype (2006), you can also immediately transfer the accrual entitlements accumulated in time evaluation and the *quota number* specified in the infotype. You do this by setting the *Transfer* field to *Transfer collected entitlement immediately*.

An employee is leaving the company and wants to use the remainder of all his or her absence quotas that have not yet been transferred.

Replace and increase

In the case of automatic accrual, time evaluation can either replace or increase the existing accrual entitlements in the *Absence Quotas* infotype (2006). You will generally want to use the *Quota Corrections* infotype (2013) to change only accrual entitlements that are **increased** by time evaluation. If an accrual entitlement were to be **replaced** by a quota correction, the

correction would be overwritten the next time that time evaluation transfers entitlements to the infotype. For this reason, you can only choose the *Transfer collected entitlement immediately* function for quotas that are to be replaced.

If an accrual entitlement is replaced by the quota correction, you can only enter one record for each day. This is because a second quota correction would overwrite the first one, thereby making it void.

Customizing

To check whether a quota is replaced or increased, choose the Customizing step:
Personnel Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Automatic Accrual of Absence Quotas → Permit Generation of Quotas in Time Evaluation.

Integration

You can only use the infotype if you use the *Time Evaluation* component. You must also use the Automatic Accrual of Absence Quotas [Extern] function.

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Time Management Master Record

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Planned Working Time (Infotype 0007)

Definition

In this infotype, you define when and where an employee works within your enterprise on a daily basis. In addition, you use the infotype to determine whether the employee's time data is evaluated by Time Evaluation [Extern].

Use

By assigning a work schedule rule [Extern] in the *Planned working time* infotype (0007), you ensure that the system can determine the employee's personal planned working time. You can change the planned working time determined by the system to suit your requirements. For example, you can use an existing full-time work schedule rule as the basis for defining a special provision for a part-time employee. The planned working time defined for the full-time employee is reduced to the percentage the part-time employee must work.

If you want an employee's time data to be processed by *Time Evaluation*, you must specify the relevant processing type in the *Time Management status* field.

You can also determine the view for calculating weekly overtime. Any hours worked over the planned working time can then be evaluated as overtime.

Structure

The table below defines in more detail the options in the *Planned Working Time* infotype (0007):

Work schedule rule	In this field, you specify the work schedule rule you want the system to use to calculate the employee's personal planned working time.
Time Management status	If you want your employee's time data to be evaluated by *Time Evaluation*, you must set the *Time Management status*
Working week	In this field, you specify which working week (for example, 7 or 14 days, start of working week is a Sunday, and so on) is valid for the employee.
Part-time employee	Select this option if you want to reduce the planned working time of an existing full-time work schedule rule to the percentage specified in the *Employment percent* field. Also select this option if you have created a special work schedule rule for part-time employees. You can then use the part-time status of these employees as a criterion in statistical queries.
Employment percentage	If you want an employee's planned working time to be different to that determined by the work schedule rule (especially when reducing planned working time for part-time employees), enter the percentage, in relation to a full-time employee, of planned working time that the employee must work.
Daily/Weekly/Monthly /Annual working hours	The system calculates the specifications in these fields based on the work schedule rule you enter. If you change the value in one of the fields, the system automatically recalculates the values in the remaining fields.

Weekly workdays	If required, you can overwrite the number of workdays per week calculated by the system. This information is mostly provided for planning purposes and can be included in evaluations. It has no effect on how the planned working time is structured.
Dynamic daily work schedule	This option is available when you select the *Part-time employee* option and choose *Enter*. If you choose this option, the system reduces the planned working time determined by the work schedule rule to the percentage you enter in the *Employment percent* field. When calculating an employee's new working time, the system uses the specifications from the daily work schedule for the work schedule rule. The system takes the start of work time from the daily work schedule as its starting point and, taking into account the break schedule, adds the new number of planned hours.
Minimum and maximum working hours per day	This option is available when you select the *Part-time employee* option and choose *Enter.* The specifications you make in these fields are optional. Any values you enter can be used in *Time Evaluation* but have no influence on an employee's daily work schedule. If you enter values in these fields, you must also select the *Dyn. daily work schedule* option.

You can also set up this infotype to include the *Additional Time ID* field. This indicator is a special customer-specific ID that can be individually defined in *R/3 Payroll*. This ID is not used in the standard SAP System. If you would like to use this field, see Screen Control for Infotypes [Extern].

Integration

Changes made to planned working time affect *Time Evaluation* and consequently *Payroll.*

For more information, see:

Maintaining Planned Working Time for Full-Time Employees [Extern]

Maintaining Planned Working Time for Part-Time Employees [Extern]

Time Recording Information Infotype (0050)

Definition

Infotype 0050 is only used if employee time data is accounted using the time evaluation program.

In infotype 0050, you can enter master data for employees who record their clock-in/out times at a time recording terminal and control data for time evaluation. You must maintain this infotype for all employees who take part in time recording.

Before the time evaluation program can be run for a particular employee, you must specify the *Time Management status* in the *Planned working time* infotype (0007). Otherwise the system cannot account the employee's time data with the time evaluation program.

Structure

Time ID

You can store time ID data for an employee here. This data includes the version number, which can be used to assign the employee the same ID number if he or she has lost the ID card.

Interface data

Interface data comprises information required by the time recording terminals.

You must enter the *subsystem grouping* for employees who clock in/out at a time recording terminal. This field specifies the time recording terminals to which an employee's mini-master records are downloaded.

Time Variables

Here you can set special indicators that can be queried in time evaluation. These indicators are user-definable and can be queried and processed in user-specific personnel calculation rules.

See also:

Maintaining Time Recording Information [Extern]

Special Absences

Maternity Protection Infotype (0080)

Definition

The *Maternity Protection* infotype (0080) is an enhancement of the *Absences* infotype (2001). The *Maternity Protection* infotype (0080) enables you to record all absences related to maternity protection and parental leave. You can only use this infotype for female employees.

If you want to enter parental leave for a male employee, use the standard *Absences* infotype (2001).

Absences entered in *Maternity Protection* are also stored automatically in the *Absences* infotype.

Use

Default Values for Maternity Protection

You can make settings for the *Maternity Protection* infotype in Customizing. The standard R/3 System proposes certain absence types and calculates the related periods when you enter the expected and actual date of delivery and the type of birth. You can overwrite these default values or add other absence types, as required.

A special feature of this infotype relates to the validity period of records. The system automatically overwrites the “from” and “to” dates according to the specified periods.

In Customizing, you can specify the dates up to which an employee can apply for parental leave. If these dates are exceeded, the system does not permit you to enter the absence type.

See also:

Maintaining Maternity Protection and Parental Leave Data [Extern]

Military Service Infotype (0081)

Definition

The *Military Service* infotype (0081) is an enhancement to the *Absences* infotype (2001). You use this infotype for absences related to military and civil service.

Absences entered in *Military Service* are automatically stored in the *Absences* infotype. You can maintain the absences further in the *Absences* infotype.

Use

Default Values for Military Service

Choose the *Military Service* infotype (0081).

1. The standard R/3 System includes certain default absence types. If you maintain the absence data, the system automatically changes the validity period of the infotype record.
2. You assign absence types to, and create absence periods for, *Military service types* in Customizing. Every military service type contains different duration periods for an absence. If these periods are exceeded, the system displays a warning, but processing continues.

   Periods can also be stored for *Absence types* (subtypes of the *Absences* infotype). These periods can not be exceeded.

   You can set up the system in Customizing so that absences in this infotype can only be entered for male employees, or for both male and female employees.

See also:

Maintaining Military Service Data [Extern]

Payroll

Australia

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

1. For which the payroll is to be run
2. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Belgium

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  - In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  - In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

3. For which the payroll is to be run
4. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value + (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Denmark

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

5. For which the payroll is to be run
6. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Tax Data

Fiscal Data (Infotype 0072)

Definition

This infotype stores an employee's tax details.

Use

The information needed for calculating tax for an employee is stored in this infotype.

Structure

If you do not create a *Fiscal Data* (0072) for the employee, no payroll run can take place.

Tax information

The information needed is taken from the employee's tax card.

If no tax card is present at the time of payroll run a default tax percentage and exemption is used for calculating the tax.

Exemption amount

The information is needed to decide the employee's exemption and is found at the tax card.

Once the *monthly exemption* is entered, the *weekly exemption*, *14 day exemption*, *exemption per day* and *exemption per period* is automatically calculated. The calculation of the tax itself is only based on the daily and period exemption.

Additional information

The information in the *Active key* describes how the employee is attached to the labour market.

The tax authorities decides which type of employees have to pay "AM-bidrag" and "AM-grundlag" and if the employee is taxed. In most cases the employee has to pay "AM-bidrag" and "AM-grundlag" and is taxed.

Garnishment

Garnishment (Infotype 0200)

Definition

This infotype stores garnishment details of the employee.

Use

The infotype is used when a court order decides that an employee has to pay debts. The typically garnishments are child support, unpaid taxes and so on. "Finansstyrelsen" handles all garnishments based on the court order.

Structure

Garnishments DK

The details about the garnishment are decided by the court order. The details are then passed on to the "Finansstyrelsen", which handles the whole management of the payment. This includes the communication with the company as well as the receiver of the garnishment.

The only information which the company is given is the *garnishment number* as well as the *explanation.*

The company does not know the *priority* of the garnishment nor the *beginning balance* if it is more than kr. 10.000. "Finansstyrelsen" handles and decides the priority if the employee has more garnishments to pay.

Deduction

"Finansstyrelsen" informs the company about the percentage which must be deducted from the monthly gross salary of the employee. The percentage which is deducted is based on the court order.

Payee

The "Finansstyrelsen" receives the monthly deduction through PBS and transfer the amount to the actual receiver of the garnishment.

The Payee information is obsolete since the legal change of September 1998. The garnishment deduction is automatically transferred to "Finansstyrelsen" by PBS.

Pensions

Private Pension (Infotype 0073)

Definition

This infotype stores all the information about an employee's private pension. It includes the employer's contribution as well as the employee's contribution.

Use

The information is used for calculating the contributions to be paid into the employee's pension schemes.

Three types of pension schemes can be stored in this infotype:

- The company's own pension scheme to which the company itself contributes
- An employee's own voluntary pension scheme in a pension company of his/her own choice
- AMP (Arbejdsmarkedspension). The AMP pension scheme is based on collective bargaining agreements(overenskomstforhandlinger) with certain trade unions. The agreement specifies for instance how much the employer as well as the employee have to pay.

The infotype also stores the bank details as well as the details of the pension company which is used when paying contributions into the pension company.

During the employment there might be changes in the employee's pension situation. New records can then be created based on the old pension record. This also applies if the employee decides to change the contribution made to the pension scheme.

Structure

Pension data

This group box stores all the information describing the type of pension scheme, pension company etc.

ER contribution

This group box stores the information about the employer's contribution to the pension scheme.

EE contribution

This group box stores the information about the employee's contribution to the pension scheme.

Payee

This group box stores all the information needed when transferring the pension contribution to the pension company via PBS.

ATP Pension and Barselsfond (Infotype 0075)

Definition

This infotype stores all the information needed to calculate ATP (wage earners' supplementary pension) of an employee.

This infotype also stores the information if the employee participates in "Barselsfond".

Use

All the information needed to calculate ATP for an employee.

If you do not create an *ATP Pension* (0075) for the employee, no payroll can take place.

Structure

ATP - additional pension

Every wage earner between 16 and 66 is covered by ATP. Both the employee as well as the employer has to contribute to ATP. The supplementary pension will be paid out when the employee is 67 years old. The amount paid out is depending on how many years the employee has contributed to ATP.

The contributions vary depending on how the employee is engaged. The total ATP contribution is calculated and is paid into ATP per quarter.

An industrial worker who participates in "Industriens Barselsfond" and has nine months seniority, is entitled to wages during the 14 weeks maternity leave. The employer contribute to the "Barselsfond" on behalf of the employee and gets the expenses reimbursed from "Industriens Barselfond". When the worker is on maternity leave the savings are used to supplement the unemployment benefit up to the maximum unemployment benefit.

Only employees who are entitled to unemployment benefit while they have maternity leave have the possibility to participate in "Industriens Barselsfond".

Company Car

Company Car (Infotype 0442)

Definition

Maintain employee company car information using this infotype.

Use

Details maintained on this infotype provide the system with the information necessary to calculate employee contributions toward the company car and the corresponding tax implications.

Structure

The information stored on this infotype is divided into two categories:

Car information

- The *Car manufacturer* and *Car model* fields contain information that the system uses to generate the list price. The fields are only relevant if the car is new or has been purchased within the first three years of the first registration.
- The *License plate number* field is only for administrative use.
- The *Registration date* and *Buy date* fields determine the month from which the employee is taxed.

Price & Benefit

The taxable amount is based on a percentage of the value of the car. In 1998 the percentage was 23, in 1999 the percentage is 24 and in 2000 the percentage will be 25.

The value of the car is fixed to a minimum of dkr. 160.000 and to a maximum of dkr. 450.000 (for 1999).

If the car is new or has been purchased within the first three years of the first registration, the price of the new car (a price determined by the Told- og Skatteregionerne) is the basis of calculation for the benefit value. The basis of calculation applies in the year of income (calendar year) when the car first is registered as well as the two following years of income. In the fourth and subsequent years of income, the value is reduced to 75 percent of the new car price, with a minimum value of dkr. 160.000.

If the employer buys a new car for dkr. 288.000 on the 1 December 1998, and the employee receives the car on the 10 December 1998, the employee is taxed for the benefit value for one month (December) in 1998:

288.000 ∗ 23% ∗ 1/12 = 5.520 dkr.

In 1999, the employee is taxed for 24% of the benefit value for the complete year:

288.000 ∗ 24% ∗ 1/1 = 69.120 dkr.

In 2000, the employee is taxed for 25% of the benefit value for the complete year:

288.000 ∗ 25% ∗ 1/1 = 72.000 dkr.

In the year 2001, in the fourth year of income, the value of the car is reduced to 75% of the original price of the new car:

288.000 ∗ 75% ∗ 25 % ∗ 1/1 = 54.000 dkr.

Statistics

Statistics (Infotype 0204)

Definition

This infotype stores the statistical data of an employee.

Use

The information stored in this infotype, is used when reporting statistical data to DA (Danish Employer Association), DS (Statistics Denmark) and FA (Finanssektorens Arbejdsgiverforening).

Structure - subtype 1

All companies which are members of either DA, or a subdivision of DA, have to report statistical information concerning every employee. DA then reports the information to DS.

Companies which do not have membership of DA must report the statistical information directly to DS.

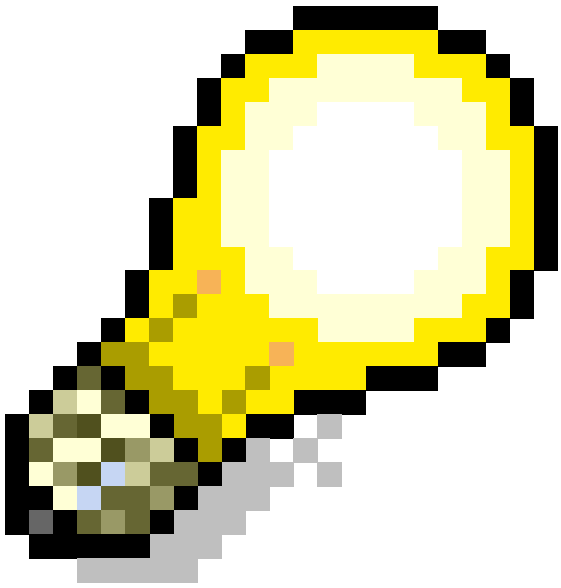
For every payroll period, the system collects the statistical data for the employee.

General information on DA/DS statistics

The group box holds information concerning the conditions of employment of the employee.

ARE End Description of training

The group box holds information concerning the employee's education and training. The education and training codes are five-figure numbers which have to be selected for every employee. The codes are based on the systematical nomenclature of the Danish educational system DUN ("Dansk uddannelses-nomenklatur"). DUN groups the education and training according to the professional content.



A disk containing the DUN codes is supplied by DS and is then loaded in the SAP system.

The ten main fields of DUN are:

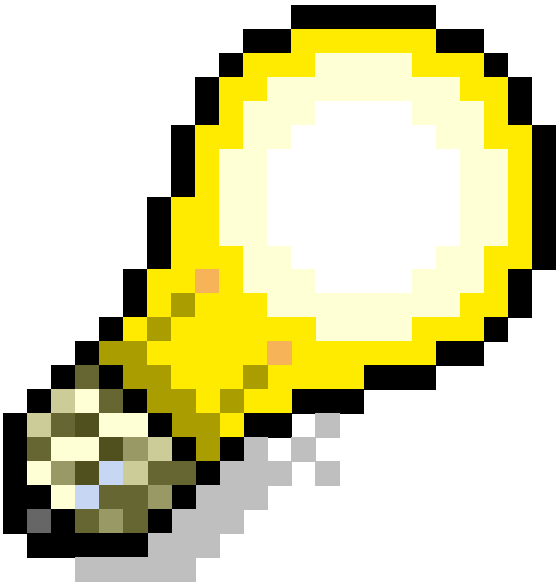
Statistics (Infotype 0204)

- 0 Non-vocationally oriented education and training ("Ikke erhvervsrettede uddannelser")
- 1 Pedagogical education ("Pædagogiske uddannelser")
- 2 Humanities, religious and aesthetic education ("Humanistiske, religiøse og æstetiske uddannelser")
- 3 Social studies, office- and business training and education ("Samfunds-, kontor og handelsuddannelser")
- 4 Scientific education ("Naturvidenskabelige uddannelser")
- 5 Industrial training and training of artisans ("Industri- og håndværkstekniske uddannelser")
- 6 Agronomics, fishing and education concerning food ("Jordbrugs-, fiskeri- og levnedsmiddeluddannelser")
- 7 Training in transportation ("Transporttekniske uddannelser")
- 8 Education and training concerning health care ("Sundhedsuddannelser")
- 9 Education concerning public safety ("Uddannelser vedrørende offentlig sikkerhed mv.")

If you want to express the level of training and education, an extra figure has to be added to the DUN code. To determine the level of training and education, you should consider the final level. In most cases the professional level is determined by the length of the previous education or training together with the official duration of the education or training. When determining the professional level it is also relevant to use aspects like traineeship in a company, work experience, maturity etc.

DISCO Start Description of work function

The group box holds information concerning the employee's work function. The work function codes are six-figure numbers which have to be selected for every employee. The codes are based on the Danish version of the international nomenclature ISCO - DISCO ("International Standard Classification of Occupations"). The DISCO nomenclature divides the Danish labour market in 372 subgroups containing around 2000 designations of the most common professions in Denmark.



A disk containing the DISCO codes is supplied by DA, or the subdivision which your company is a member of, and is then loaded in the SAP system.

The ten main fields of DISCO:

- 1 Management in top level in companies, organizations and public management
- 2 Employment presupposes high-level skills in a specific area
- 3 Employment presupposes medium-level skills
- 4 Office work
- 5 Sales, service and welfare work
- 6 Employment within agriculture, gardening, forestry, hunting and fishing which presupposes basic skills
- 7 Artisan's work
- 8 Process- and machine operator and transportation and construction work
- 9 Other employment
- 0 Employment within the military

All ten main fields are divided into subgroups which makes it possible to specify the work function of the employee.

Structure - subtype 3

Subtype 3 is used for companies that are members of FA ("Finanssektorens Arbejdsgiverforening") for reporting statistical information concerning the employees.

General data for FA statistics

This group box holds all information about the employee's working conditions.

Statistics (Infotype 0204)

Assignment to wage level

This group box holds factors that influence the employee's wages:

- Collective agreement area
- Pay grade
- Date of increase
- Pay scale level

Length of service

This group box holds information concerning the employee's:

- Hiring date
- Leave date
- Previous employment or occupation
- Leaving key

Vacation

Vacation Savings (Infotype 0074)

Definition

This infotype stores the employee's vacation savings details. The infotype consists of two subtypes.

Use

The information is needed when determining the way the employee saves vacation allowance and the amount.

If you do not maintain the infotype *Vacation Savings* (0074) for an employee, it is not possible to process payroll.

Structure - subtype 1

Calculation base

Based on information entered, vacation allowance is calculated. The following criteria determine the type of vacation savings the employee is entitled to:

- The legal status of the employee

- The company agreement

The vacation allowance can be paid out in three different ways:

- "FerieKonto" is mostly used for salaried employees ("funktionærer") who are entitled to paid vacation
- Cash payment ("kontant afregning"/"feriemærker") is only used for hourly paid employees
- Non-cash payment is only used for hourly paid employees.

The Vacation Act ("Ferieloven") covers most employees in the private sector labour market in Denmark.

The employee must save up the right to paid vacation the year before he/she can spend it. The period where the vacation allowance is saved up ("optjeningsår") follows the calendar year (e.g. 1/1-31/12-1998). The period where the vacation money must be spend is the vacation year ("ferieår") which is between the 2/5-1998 - 1/5-1999. The saved vacation must be taken during the vacation year ("ferieår") and cannot be carried over to the next vacation year.

FerieKonto

Every month the company has to transfer the vacation allowance to "FerieKonto". If an employee leaves the company, the saved vacation allowance is transferred to "FerieKonto" by the company just after the employee leaves the company. The remaining vacation savings are then handled by "FerieKonto".

Public holidays saved up

Hourly paid employees must save up for the public holidays and Sundays. For every payroll period a certain percentage of the gross wages are saved up and are used as payment on the public holidays and Sundays ("Søgnehelligdagsbetaling") the following payroll period.

Structure - subtype 2

Subtype 2 is used when an employee leaves the company and the vacation allowance wished to be processed.

Each of the three vacation years, (this year, last year, and the year before last) that might be involved when paying out vacation allowance, has an individual tabstrip. This makes it possible to handle each vacation year separately as well as treat each vacation year differently.

Accumulated this year

This tabstrip is used when settling the vacation allowance for the current year.

Accumulated last year

This tabstrip is used when settling the vacation allowance for last year.

Accumulated year before last

This tabstrip is used when settling the vacation allowance for the year before last.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Germany

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

Reference Personnel Number Priority (Infotype 0121)

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

7. For which the payroll is to be run
8. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

Appraisals (Infotype 0025)

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Company Pension Scheme

Rentenbasisbezüge (Infotyp 0201)

Im Infotyp *Rentenbasisbezüge* (0201) werden Versorgungsbezüge im Rahmen der betrieblichen Altersversorgung erfaßt.

In der SAP-Standardauslieferung wird Ihnen der Infotyp *Rentenbasisbezüge* (0201) bei Durchführen der Personalmaßnahme *Einstellung* nicht zur Pflege angeboten. Falls Sie in Ihrem Unternehmen bereits bei der Einstellung neuer Mitarbeiter Ansprüche auf Rentenbasisbezüge anlegen möchten, empfiehlt Ihnen SAP den Infotyp *Rentenbasisbezüge* (0201) in die Personalmaßnahme *Einstellung* aufzunehmen.

Informationen hierzu finden Sie im Einführungsleitfaden *Personaladministration* im Kapitel *Anpassung der Arbeitsabläufe → Maßnahmen.*

Rententyp

Der Infotyp *Rentenbasisbezüge* (0201) unterteilt sich in Rententypen. Jeder Rententyp bildet einen Subtyp. Grundsätzlich wird zwischen Rentenbasisbezügen in Form einer Eigenrente und Rentenbasisbezüge in Form einer Hinterbliebenenrente unterschieden. In der SAP-Standardauslieferung sind folgende Rententypen als Subtypen eingerichtet:

- Subtyp 0001: Pensionskassenrenten mit Rentenart Eigenrente
- Subtyp 0002: Pensionskassenrenten mit Rentenart Hinterbliebenenrente
- Subtyp 0005: Firmenrenten mit Rentenart Hinterbliebenenrente
- Subtyp 0006: Firmenrenten mit Rentenart Hinterbliebenenrente

Rentenbasisbezüge

In den Eingabefeldern unter der Überschrift *Rentenbasisbezüge* werden alle relevanten Daten zu einem einzelnen Rentenbasisbezug erfaßt.

Es können pro Rententyp bis zu zwanzig Rentenleistungen entsprechend ihres Ursprunges, Höhe und Kontierung gespeichert werden. Der Infotyp bietet die Möglichkeit die Renten eines Rententyps im Übersichtsbild oder einzeln im Detailbild zu erfassen und zu bearbeiten.

Company Insurance

Company Insurance (Infotype 0026)

Definition

In this infotype, you enter company insurance data in line with the company pension plan. Company insurance include payments to insurance companies and pension funds, where there is the possibility of lump-sum taxation. You enter other retirement benefits (for example, company pensions), in the *Company Pension* infotype (0053).

Use

The entered data is used in payroll.

Structure

The *Company Insurance* infotype (0026) is divided into insurance categories. Each insurance category forms a subtype. The following insurance categories are set up as subtypes in the standard system:

- Subtype 0001: Life Insurance
- Subtype 0002: Group Accident Insurance
- Subtype 0003: Pension Insurance with Payment Options
- Subtype 0004: Death Risk Insurance
- Subtype 0005: Accident Insurance with Restitution of Premiums

Data Entry and Transfer

DEÜV (Infotyp 0020)

In diesem Infotyp werden für die Datenerfassungs- und Übertragungsverordnung (DEÜV) relevante Daten erfaßt.

Der Infotyp *DEÜV* (0020) ist in zwei getrennte Eingabemasken für die Standard-DEÜV und für knappschaftlich versicherte Mitarbeiter unterteilt. DEÜV-Daten für die Standard-DEÜV werden in der Eingabemaske *DEÜV* gepflegt. Über die Funktionstaste *Knappschaft* wird in die Eingabemaske *Knappschafts-DEÜV* verzweigt.

Die hier erfaßten Daten werden bei der Lohn- und Gehaltsabrechnung verwendet sowie bei den nachfolgenden DEÜV-Auswertungen.

Die eigentliche Kennzeichnung knappschaftlicher Mitarbeiter erfolgt im Infotyp *Sozialversicherung* (Infotyp 0013). Dort wird für knappschaftliche Mitarbeiter das SV-Attribut `21` gesetzt. Ist ein Mitarbeiter im Infotyp *Sozialversicherung* (Infotyp 0013) als Knappe gekennzeichnet, müssen an dieser Stelle die Felder in der Eingabemaske *Knappschafts-DEÜV* gepflegt werden. Bei Pflege der Felder in der Eingabemaske *DEÜV* erhalten Sie eine Fehlermeldung.

Gleiches gilt umgekehrt für einen nicht knappschaftlichen Mitarbeiter. In diesem Fall müssen die Felder in der Eingabemaske *DEÜV* gepflegt werden.

DEÜV-Start (Infotyp 0341)

Definition

Im Infotyp *DEÜV-Start* (0341) werden Daten hinterlegt, die den versicherungsrechtlichen Status eines Mitarbeiters bei Produktivbeginn der R/3-DEÜV beschreiben. Der Infotyp *DEÜV-Start* (0341) ist **nicht** relevant für den Übergang von der alten DÜVO zu neuen DEÜV.

Verwendung

Der Infotyp ist **nur** relevant in folgenden Fällen:

- Beginn der R/3-DEÜV mit fehlender oder unvollständiger Lohnkontoübernahme
- Produktivwerdung eines Personalbereichs oder Personalteilbereichs mit fehlender oder unvollständiger Lohnkontoübernahme
- Abrechungskreiswechsel eines Mitarbeiters

  Ein Mitarbeiter wechselt in einen neuen Abrechnungskreis, dessen Produktivbeginn nach dem Produktivbeginn des alten Abrechnungskreises liegt.

  In diesem Fall müssen Sie den früheren Produktivbeginn des alten Abrechnungskreises als *Produktivbeginn* für den Mitarbeiter eintragen

  In der Regel haben Sie vor Produktivbeginn der R/3-DEÜV eine vollständige Altdatenübernahme durchgeführt. In diesem Fall müssen Sie im Infotyp *DEÜV-Start* (0341) keine Angaben mehr machen, da die relevanten Daten bereits im R/3-System sind. Weitere Informationen zur Inbetriebnahme der R/3-DEÜV finden Sie im Kapitel *Start der DEÜV.*

Struktur

Produktivbeginn

Hier tragen Sie das Datum ein, ab dem für den jeweiligen Mitarbeiter Meldungen mit der R/3-DEÜV erzeugt werden sollen.

Zeiträume, die **vor** dem Produktivbeginn liegen, werden von der DEÜV nicht berücksichtigt. Diese Zeiträume müssen also bereits gemeldet sein.

Damit die DEÜV einen eindeutigen Zeitraumbeginn feststellen kann, müssen folgende Voraussetzungen gegeben sein:

- Sie müssen zum Jahresanfang mit der DEÜV produktiv werden. In diesem Fall geben Sie als Produktivbeginn den 01.01. des Jahres an.
- Wenn Sie nicht zum Jahresanfang produktiv werden, müssen Sie statt dessen zum Produktivbeginn eine Meldung erzeugen. In diesem Fall markieren Sie das Kennzeichen *Sonderanmeldung*.

DEÜV-Start (Infotyp 0341)

Sonderanmeldung

Das Kennzeichen *Sonderanmeldung* bewirkt, daß eine Anmeldung mit Grund **13** (sonstige Gründe) erstellt wird.

Anfangszustand

Hier vermerken Sie den versicherungsrechtlichen Status eines Mitarbeiters bei Produktivbeginn der R/3-DEÜV.

Child Allowance

Kindergeld (Infotyp 0232)

Der Infotyp *Kindergeld D* (0232) dient nur noch zur Anzeige von Altdaten.

Die Pflege der Kindergelddaten ist nur im Bereich des öffentlichen Dienstes Deutschland von Bedeutung. Legen Sie diesbezügliche Daten zum Kindergeld immer im Infotyp *Kindergeld* (**0118**) an.

Im Infotyp *Kindergeld* (0232) wird der Anspruch eines Arbeitnehmers auf die Auszahlung von Kindergeld durch den Arbeitgeber abgelegt.

Der angegebene Kindergeldbetrag wird dem Arbeitnehmer mit der monatlichen Abrechnung ausgezahlt. Das ausgezahlte Kindergeld wird in der Lohnsteuerbescheinigung des Arbeitnehmers ausgewiesen. Auf Arbeitgeberseite wird der ausgezahlte Betrag bei der Lohnsteueranmeldung von der abzuführenden Lohnsteuer abgezogen.

Kindergeldbescheinigung

Im Feld *Kindergeldnummer* sind die Ziffern, die in der Bescheinigung vor dem Schrägstrich angegeben sind, einzutragen. Die Ziffern, die in der Bescheinigung dem Schrägstrich folgen, werden in das Feld Familienkasse eingegeben.

Im Feld *Kindergeld* ist der im angegebenen Zeitraum gültige monatliche Auszahlungsbetrag einzugeben.

Vorlage Bescheinigung

Wenn Sie die Kindergeldbescheinigung zurückgeben, pflegen Sie die Felder dieser Gruppe von Daten.

Bei einer Rückgabe der Kindergeldbescheinigung markieren Sie das Feld *liegt nicht vor* und erfassen das *Aushändigungsdatum*. Im Feld *Empfänger* können Sie festhalten, ob die Bescheinigung dem Arbeitnehmer ausgehändigt oder direkt an die Familienkasse geschickt wurde. Der Grund für die Rückgabe kann im Feld *Aushändigungsgrund* eingetragen werden.

Reduced Hours / Bad Weather

Kurzarbeit / Winterausfallgeld (Infotyp 0049)

In diesem Infotyp werden Daten zur Berechnung von Kurzarbeit und Winterausfallgeld erfaßt. Die Daten werden in der Abrechnung verwendet.

Der Infotyp *Kurzarbeit / Winterausfallgeld* (0049) unterteilt sich in die Kategorien Kurzarbeit und Winterausfallgeld. Für jede Kategorie ist ein Subtyp eingerichtet:

- Subtyp K: *Kurzarbeit*
- Subtyp S: *Winterausfallgeld*

Anlegen des Infotyps per Batch-Input

Sie können sich Sätze dieses Infotyps für alle von Kurzarbeit / Winterausfall betroffenen Mitarbeiter automatisch anlegen lassen. Dies geschieht durch abspielen einer Batchinput-Mappe, die Sie mit dem Report RPIKUGD0 (Batch-Input für KUG/SWG) erzeugen.

Beim Batchinput werden die Felder *Gültig*, *KUG / SWG*, *Referenznummer* und *Arbeitszeitplanregel* automatisch gefüllt. Diese Angaben genügen, um für den Mitarbeiter Kurzarbeiter- bzw. Winterausfallgeld zu berechnen. Zusätzlich beinhaltet der Infotyp das Ankreuzfeld *Nimmt nicht teil* und die Blöcke *Abweichende Angaben* und *Sonderregelungen*.

Kurzarbeit / Winterausfallgeld

Die Felder *Referenznummer* und *Arbeitszeitplanregel* werden durch den Batch-Input gefüllt.

Durch Markieren des Feldes *Nimmt nicht teil* kann der Mitarbeiter von der Berechnung des Kurzarbeiter- bzw. Winterausfallgeldes ausgeschlossen werden. Dieses Feld muß von Hand gepflegt werden

Abweichende Angaben

Hier können Sie Angaben zu Steuerklasse, Kinderfreibeträgen, Lohnsatz und dem Divivsor Grundvergütung erfassen, die anstelle der sonst gültigen Angaben aus dem Infotyp *Steuer (0012)* verwendet werden. Falls Sie zu diesen Feldern Eingaben machen möchten, müssen Sie den Infotyp 0049 zusätzlich von Hand pflegen.

Sonderregelungen

Hier können Sie ein Zuschuß-Verfahren [Extern] und eine Sonderregelung [Extern] für die Berechnung von Kurzarbeitergeld bestimmen.

Sie haben zwei Möglichkeiten:

- Der Zuschuß bzw. die Sonderregelung soll für Mitarbeiter gelten, die einer bestimmten organisatorischen Einheit (Personalbereich / Personalteilbereich) angehören.

  In diesem Fall müssen Sie zunächst die Sicht *KUG Abgrenzung* (T507A) pflegen und dort das Zuschuß-Verfahren bzw. die Sonderregelung entsprechend anlegen. Informationen hierzu finden Sie im Einführungsleitfaden *Abrechnung Deutschland* unter dem *Kapitel Kurzarbeitergeld / Winterausfallgeld* im Abschnitt *Berechtigte Personen festlegen*. Anschließend erzeugen Sie eine Batch-Input-Mappe für den Infotyp 0049 und spielen die Batch-Input-Mappe ab. Die Felder *Zuschuß-Verfahren* und *Sonderregel* werden durch den Batch-Input bei allen Mitarbeitern gemäß der Angaben in der Sicht *KUG Abgrenzung* gefüllt.

- Der Zuschuß bzw. die Sonderregel soll nur für einzelne Mitarbeiter gezahlt werden, die keine organisatorische Einheit bilden.

  In diesem Fall können Sie die Felder *Zuschuß-Verfahren* und *Sonderregel* nicht per Batch-Input gemäß einer Regel in der Sicht KUG Abgrenzung automatisch füllen. Stattdessen müssen Sie den Infotyp 0049 von Hand pflegen und für die einzelnen Mitarbeiter eine Sonderregel bzw. ein Zuschuß-Verfahren angeben.

Fiscal Data

Infotyp *Steuerdaten Deutschland* (0012)

Definition

In diesem Infotyp erfassen Sie die steuerrechtlichen Daten von der Lohnsteuerkarte des Arbeitnehmers. Anhand dieser Daten werden Lohnsteuer und Anhangsteuern (Kirchensteuer und Solidaritätszuschlag) berechnet.

Verwendung

Die in diesem Infotyp enthaltenen Daten sind erforderlich für

- die Lohn- und Gehaltsabrechnung
- die Lohnsteueranmeldung
- den Lohnsteuerjahresausgleich
- die Lohnsteuerbescheinigung
- das Lohnkonto

Dieser Infotyp muß angelegt sein, damit für den Mitarbeiter eine Abrechnung durchgeführt werden kann. In der Regel legen Sie den Infotyp im Rahmen der Personalmaßnahme *Einstellung* an.

Die Zulässigkeit des Lohnsteuerjahresausgleichs wird in diesem Infotyp nicht überprüft. Diese Prüfung erfolgt während des Abrechnungslaufs.

Struktur

Dieser Infotyp umfaßt die Gruppenrahmen *Steuerkarte* und *weitere Angaben*.

Im Gruppenrahmen *Steuerkarte* erfassen Sie folgende Daten von der Lohnsteuerkarte des Mitarbeiters:

- den Gemeindeschlüssel
- die Nummer des Finanzamts
- die Steuerklasse
- den Kirchensteuerabzug
- die persönlichen und zusätzlichen Freibeträge
- die Anzahl der Kinderfreibeträge

Im Gruppenrahmen *weitere Angaben* erfassen Sie entsprechend den Erfordernissen folgende Daten:

- die Steuerpflicht
- Angaben zur Pauschalsteuer
- den Befreiungsgrund
- die geltende Sonderregel

Infotyp Steuerdaten Deutschland (0012)

- den Bescheinigungszeitraum
- die Steuertabelle
- das Steuerverfahren
- die Regelung zur Bestimmung des Versorgungsfreibetrags
- das Kirchensteuergebiet

Im Fall einer Ersteinstellung muß dieser Infotyp manuell angelegt werden.

Wenn Sie jedoch Änderungen in den Stammdaten dieses Infotyps für eine Reihe von Mitarbeitern vornehmen möchten, können Sie mit Hilfe des Reports *Batch-Input zur Erstellung neuer Steuersätze zum Jahresbeginn* (Report RPIJSTD0) automatisch neue Datensätze generieren. Weitere Informationen hierzu finden Sie im Abschnitt Erzeugen neuer Steuerdatensätze zum Jahreswechsel [Extern].

Infotyp *Vorarbeitgeber Deutschland* (0093)

Definition

In diesem Infotyp werden die Daten von der Lohnsteuerkarte des Mitarbeiters erfaßt, die von den Vorarbeitgebern bescheinigt wurden.

Verwendung

Die in diesem Infotyp hinterlegten Daten sind erforderlich für:

- die Berechnung des Jahresarbeitslohns zur Besteuerung der sonstigen Bezüge
- die Prüfung der Zulässigkeit des Lohnsteuerjahresausgleichs und des Permanenzverfahrens
- die Berechnung des Jahresbruttos und der bereits gezahlten Steuer im Fall eines Lohnsteuerjahresausgleichs

Struktur

In den Feldern des Gruppenrahmens *Allgemeine Besteuerungsmerkmale* werden die entsprechenden Daten von der Vorderseite der Lohnsteuerkarte erfaßt.

Im Gruppenrahmen *Weitere Angaben* erhalten Sie im Feld *Steuerpflicht* den Vorschlagswert *unbeschränkt steuerpflichtig*. Im Feld *Steuertabelle* schlägt das System *allgemeine Steuertabelle* vor. Sie können diese Vorschlagswerte bei Bedarf überschreiben.

Im Gruppenrahmen *Bescheinigte Werte* gibt das System Lohnarten vor, zu denen Sie jeweils die vom Vorarbeitgeber auf der Rückseite der Lohnsteuerkarte bescheinigten Beträge erfassen.

Social Insurance

Social Insurance (Infotype 0013)

Use this infotype to enter relevant data for calculating, assigning and deducting social insurance contributions. This data is used in payroll to transfer social insurance payments, to create contribution statements, and for DEUEV notifications.

You must maintain this infotype in order to run payroll. If there is no available social insurance data, then you cannot run payroll for the employee.

The *Social Insurance* infotype (0013) is closely linked to the *SI Additional Insurance* infotype (0079). You enter additional insurance data in the *SI Additional Insurance* infotype (0079). Depending on what you enter in the *Social Insurance* infotype (0013), the *SI Additional Insurance* infotype (0079) is automatically defaulted for maintenance.

SI Key/PI Number

Here, you enter indicators for health insurance (*HI indicator*), pension insurance (*PI indicator*), unemployment insurance (*UI indicator*), and nursing insurance (*PI indicator)*. The system uses the individual indicators to determine the official contribution group key (*SI Key*). *HI/PI/UI*. The system assigns default values to each social insurance indicator. This assignment is determined using the specifications regarding an employee's employee group and employee subgroup in the *Organizational Assignment* infotype (0001). If the social insurance indicator default values are overwritten, the system checks the entries. A warning or error message is displayed for invalid entries.

Assigning Health/Nursing Insurance Funds

The system defaults a fund to the *Health Insurance Fund* field. The default value is set up in Customizing.

SI Attributes

SI attributes describe the employee's insurance-related status.

Other Data

Use the *Other Data* function to go to a second entry screen. If the employee is exempt from one or more social insurance categories, or if there is a different social insurance contribution split between employer and employee, or if you must apply a special SI regulation for this employee, you must enter this here.

See also:

Create Compulsorily-Insured Employee Record [Extern]

Create Voluntarily-Insured Employee Record [Extern]

Create Privately-Insured Employee Record [Extern]

Employees Insured with an Employer-Specific HI Fund [Extern]

SV-Zusatzversicherungen (Infotyp 0079)

In diesem Infotyp werden Daten zu Zusatzversicherungen von Mitarbeitern erfaßt. Die Daten werden gemeinsam mit den Daten aus den Infotypen *Sozialversicherung* (0013) und *Zusatzversorgung* (0126) in der Lohn- und Gehaltsabrechnung verwendet.

Der Infotyp *SV-Zusatzversicherung* (0079) unterteilt sich in mehrere Versicherungsarten. Jede Versicherungsart bildet einen Subtyp. In der SAP-Standardauslieferung sind folgende Versicherungsarten als Subtyp eingerichtet:

- Subtyp 1: *Krankenversicherung*

  Dieser Subtyp wird automatisch zur Pflege vorgeschlagen, wenn im Infotyp *Sozialversicherung* (0013) als KV-Schlüssel der Wert `5` und als SV-Attribut der Wert `20` eingegeben ist. Durch diese Eingaben ist ein Mitarbeiter als privat krankenversichert gekennzeichnet. Daten zur privaten Krankenkasse werden in diesem Subtyp erfaßt.

- Subtyp 2: *Rentenversicherung*

  Dieser Subtyp wird automatisch zur Pflege vorgeschlagen, wenn im Infotyp *Sozialversicherung* (0013) als RV-Schlüssel der Wert `5` eingegeben ist. Durch diese Eingabe ist ein Mitarbeiter als von der Rentenversicherung befreit gekennzeichnet.

- Subtyp 4: *Pflegeversicherung*

  Dieser Subtyp wird automatisch zur Pflege vorgeschlagen, wenn im Infotyp *Sozialversicherung* (0013) als KV-Schlüssel der Wert **5** und als PV-Schlüssel der Wert **5** eingegeben ist. Durch diese Eingaben ist ein Mitarbeiter als freiwillig versichert in einer gesetzlichen Krankenkasse gekennzeichnet. Daten zur Pflegeversicherung bei einem freiwillig krankenversicherten Mitarbeiter werden in diesem Subtypen erfaßt.

- Subtyp 7: *BVV-Versorgung*

  Hierbei handelt es sich um die Zusatversorgung des *Beamtenversorgungsvereins des deutschen Bank- und Bankiergewerbes* (BVV).

  Dieser Subtyp wird automatisch zur Pflege vorgeschlagen, wenn im Infotyp *Zusatzversorgung* (0126) ein Satz des Subtyps 7 (BVV-Versorgung) angelegt wird.

- Subtyp 8: *Presseversorgung*

  Hierbei handelt es sich um die Zusatversorgung der *Presseversorgung der Verleger und Journalisten-Organisationen* (PVW). Dieser Subtyp wird automatisch zur Pflege vorgeschlagen, wenn im Infotyp *Zusatzversorgung* (0126) ein Satz des Subtyps 8 (BVV-Versorgung) angelegt wird.

- Subtyp 9: *allgemeine Zusatzversorgung*

Lesen Sie:

Anlegen und Berechnen der BVV-Zusatzversorgung [Extern]

Anlegen und Berechnen der PVW-Zusatzversorgung [Extern]

Anlegen und Berechnen allgemeiner Zusatzversorgungen [Extern]

Zusatzversorgung (Infotyp 0126)

In diesem Infotyp werden Daten zur Zusatzversorgung von Mitarbeitern erfaßt.

Der Infotyp *Zusatzversorgung* (0126) unterteilt sich in mehrere Zusatzversorgungsarten. Jede Zusatzversorgungsart bildet einen Subtyp.

- Subtyp 2001: *Zusatzversorgung 1*
- Subtyp 7: *BVV-Versorgung*
- Subtyp 8: *Presseversorgung*
- Subtyp 9: *allg. Zusatzversorgung*

Bei den Subtypen *BVV-Versorgung* (7) und *Presseversorgung* (8) muß zusätzlich der Infotyp *SV-Zusatzversicherung* (0079) gepflegt werden.

Lesen Sie:

Anlegen und Berechnen der BVV-Zusatzversorgung [Extern]

Anlegen und Berechnen der PVW-Zusatzversorgung [Extern]

Anlegen und Berechnen allgemeiner Zusatzversorgungen [Extern]

Capital Formation

Infotyp *Vermögensbildung* (0010)

Definition

Im Infotyp *Vermögensbildung* (0010) erfassen Sie Daten zu Verträgen der Vermögensbildung, für die nach dem Vermögensbildungsgesetz vom Arbeitgeber vermögenswirksame Leistungen erbracht werden. Die Daten werden in der Personalabrechnung verwendet.

Die Vermögensbildung wird in der Abrechnung in zwei Schritten bearbeitet. Im Bruttoteil wird der Arbeitgeberanteil erzeugt, im Nettoteil wird die Überweisung durchgeführt sowie die Vermögensbildung nach Anlagearten gesammelt.

Struktur

Ein Mitarbeiter kann mehrere Verträge zur Vermögensbildung abschließen. Jeder Vertrag erhält eine laufende Nummer. Jede laufende Nummer bildet einen Subtyp. In der Standardauslieferung sind Subtypen für Verträge der Nummern 1 bis 10 eingerichtet.

Bei mehreren Verträgen zur Vermögensbildung eines Mitarbeiters müssen Sie pro Vertrag einen eigenen Subtyp anlegen.

Anlageart

Die Wahl der Anlageart und des Unternehmens oder Instituts, bei dem die vermögenswirksame Leistung angelegt werden soll, bestimmt im Rahmen der gesetzlichen Möglichkeiten stets der Mitarbeiter.

In der Standardauslieferung werden die folgenden Anlagearten angeboten:

Nr.	Anlageart	Bedeutung
1	*Ratensparen Bank*	Sparverträge mit einem Geldinstitut werden seit 01.01.1990 nicht mehr staatlich begünstigt
2	*Bausparen*	Anlagen zum Wohnungsbau
3	*Lebensversicherung*	Versicherungssparen wird seit 01.01.1990 nicht mehr staatlich begünstigt
4	*Kapitalsparen*	z.B. Wertpapierkaufvertrag, Beteiligungsvertrag
5	*Kapitalsparen AG*	z.B. Beteiligungskaufvertrag des Mitarbeiters mit dem Arbeitgeber

Anzahl Arbeitgeberanteile

Im Feld *Anzahl Arbeitgeberanteile* bestimmen Sie, wie oft pro Zahlungszeitpunkt der konstante monatliche Arbeitgeberanteil zum steuer- und beitragspflichtigen Einkommen des Bruttoarbeitslohns bzw. Bruttoarbeitsentgelts hinzukommt.

Sie können beispielsweise folgende Werte eingeben:

- `1` : (monatliche Überweisung)
- `3` : (vierteljährliche Überweisung)

- 12: (jährliche Überweisung)
- 0 : (kein Arbeitgeberanteil)

Ein Arbeitgeber überweist die Vermögensbildung für einen Auszubildenden vierteljährlich. Die erste Überweisung erfolgt im Januar.

Der Auszubildende soll in den Überweisungsmonaten drei Arbeitgeberanteile in Höhe von jeweils 52,- DM erhalten, in den anderen Monaten jedoch keinen Arbeitgeberanteil.

Geben Sie folgende Werte ein:

Arbeitgeberanteil	02 (Auszubildende: 52 DM)
Erste Auszahlp.	01 (ab Januar)
Abstand	03 (vierteljährlich)
Anzahl AG-Anteile	3 (drei Arbeitgeberanteile pro Zahlungszeitpunkt)

In der Abrechnung wird zum angegebenen Zahlungszeitpunkt der Arbeitgeberanteil mit der Anzahl der Arbeitgeberanteile multipliziert. Der Auszubildende erhält also im Januar, im April, im Juli und im Oktober jeweils 156,- DM vermögenswirksame Leistungen.

Sparbetrag und Arbeitgeberanteil

Im Feld *Arbeitgeberanteil* bestimmen Sie die Höhe des Arbeitgeberanteils an der vermögenswirksamen Leistung für jeden Zahlungszeitpunkt.

Feldeintrag	Bezeichnung	Wert in DM
01	*Arbeitnehmer*	78,00
02	*Auszubildender*	52,00

Bei der Berechnung des Arbeitgeberanteils werden im Standard nur die Vermögensbildungsverträge berücksichtigt, die im Feld *Verarbeitungsart* keinen Eintrag haben, d.h. regulär berechnet werden.

Hat ein Mitarbeiter mehrere Vermögensbildungsverträge, wird zunächst der Vertrag mit dem höchsten Arbeitgeberanteil pro Zahlungszeitpunkt ausgewertet.

Die Sparbeträge des Mitarbeiters müssen höher sein als der Arbeitgeberanteil. Ist die Summe der Sparverträge kleiner als der Arbeitgeberanteil, wird der Arbeitgeberanteil in der Abrechnung auf die Summe der Sparverträge gekürzt.

Für einen Mitabeiter soll ein Sparbetrag von 52,- DM monatlich als vermögenswirksame Leistung überwiesen werden.

Der monatliche Arbeitgeberanteil beträgt 78,- DM.

Bei der Abrechnung wird der Arbeitgeberanteil zum Bruttolohn des Mitarbeiters hinzuaddiert, der Sparbetrag wird vom Nettolohn abgezogen.

Da der Sparbetrag des Mitarbeiters (52,- DM) geringer ist als der Arbeitgeberanteil (78,- DM), wird der Arbeitgeberanteil in der Abrechnung auf die Höhe des Sparbetrags gekürzt.

Erste Auszahlungsperiode

Im Feld *Erste Auszahlp.* bestimmen Sie, in welcher Periode der Arbeitgeberanteil zur Vermögensbildung erstmals errechnet und der Sparbetrag des Mitarbeiters überwiesen wird. Die erste Auszahlungsperiode wird in Verbindung mit dem Feld *Abstand* zur Ermittlung sämtlicher Auszahlungsperioden verwendet. Die erste Auszahlungsperiode gilt für das aktuelle Jahr sowie für alle folgenden Jahre.

Erste Auszahlungsperiode: `06`

Abstand: `02`

Die erste Überweisung erfolgt im Juni, die weiteren Auszahlungen finden alle zwei Monate statt, also im August, Oktober und Dezember.

Im Folgejahr werden die vermögenswirksamen Leistungen erst wieder im Juni abgeführt, die weiteren Auszahlungen erfolgen wieder, wie im Vorjahr, im August, Oktober und Dezember.

Abstand

Im Feld *Abstand* bestimmen Sie, in welchen regelmäßigen Abständen die Vermögensbildung überwiesen werden soll, ausgehend von der ersten Auszahlungsperiode. Sie können den Abstand immer nur im Zusammenhang mit der ersten Auszahlungsperiode bestimmen.

Es gibt folgende Eingabemöglichkeiten:

- Sie geben **keine** erste Auszahlungsperiode und **keinen** Abstand ein.

  Die Vermögensbildung wird in **jeder Auszahlungsperiode** verarbeitet.

- Sie geben die **erste** Auszahlungsperiode und **keinen** Abstand ein.

  Die Vermögensbildung wird **nur in der ersten** Auszahlungsperiode jedes Jahres verarbeitet.

  Erste Auszahlungsperiode: `12`

  Abstand: **`keine Eingabe`**

  Die Vermögensbildung wird immer im Dezember verarbeitet.

- Sie geben die **erste** Auszahlungsperiode und **einen** Abstand ein.

  Die folgenden Auszahlungsperioden errechnen sich jeweils aus erster Auszahlungsperiode plus Abstand, zweiter Auszahlungsperiode plus Abstand, usw.

  Erste Auszahlungsperiode: `05`

Abstand: 01

Die Vermögensbildung wird erstmalig im Mai überwiesen, danach regelmäßig jeden Monat. Im folgenden Jahr wird wieder mit der festgelegten ersten Auszahlungsperiode begonnen.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Workers' Compensation Association (Infotype 0029)

Use the data from the *Workers' Compensation* (0029) infotype to create a workers' compensation association list.

Workers' Compensation Association Data

The workers' compensation association is the statutory insurer for accident insurance. Every company belonging to this industry branch is a member of the association. The company has to pay a contribution to the association for every insured person.

The association divides the company's jobs into areas, such as hazard pay positions. It then assigns these jobs a hazard class. These hazard classes are revised every 5 years.

The hazard pay jobs and the hazard classes are used to calculate the company's contribution. The company must provide the association with a list of the number of insured persons for each hazard pay job, on an annual basis, together with the annual gross pay (Workers' Compensation Association List or Wage statement).

The workers' compensation association report displays an error list if:

- There is no data record for an employee in the *Workers' Compensation* (0029) infotype for the respective fiscal year
- An employee's workers' compensation association gross pay is higher that the association's pay ceiling

If you want to suppress this note, you can enter this person as an exception. Do this in the *Statistics* (0033) infotype, Subtype 1, *Workers' Compensation Association* (03), *not relevant for WCA* (0001). When doing this, check the validity period.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Payroll for Construction Industry

Infotyp Bauwirtschaft Sozialkassenverfahren (0189)

Definition

Im Infotyp *Bauwirtschaft Sozialkassenverfahren* ordnen Sie den Mitarbeiter Ihres Bauunternehmens mit der zugehörigen Arbeitnehmernummer einer Sozialkasse des Baugewerbes zu. Diese Zuordnung ist Voraussetzung, damit der Mitarbeiter bei der Ermittlung der Sozialkassenbeiträge und beim Datenträgeraustausch berücksichtigt wird.

Verwendung

Die Arbeitnehmernummer wird bei der Eingabe vom System nach den bekannten Bestandteilen, wie z.B. Geburtsdatum, Namensinitiale, geprüft. Sie können sich die bekannten Bestandteile der Arbeitnehmernummer bei der Eingabe vorschlagen lassen.

Wenn die Arbeitnehmernummer nicht bekannt ist, können Sie zunächst eine fiktive Arbeitnehmernummer eingeben. Diese fiktive Nummer korrigieren Sie rückwirkend, wenn die Sozialkasse die Arbeitnehmernummer vergeben bzw. mitgeteilt hat.

Zusätzlich können Sie für einen Mitarbeiter die Teilnahme am Sozialkassenverfahren von der Beitragsermittlung und dem Erstattungsverfahren der Versorgungskassen ausschließen, auch wenn der Mitarbeiter einer Versorgungskasse zugeordnet ist.

Dies kann bei leitenden Angestellten oder Personen der Geschäftsführung erforderlich sein, wenn diese nicht bereits durch ihre Zuordnung zu einem entsprechenden Mitarbeiterkreis davon ausgeschlossen sind.

Infotyp Bauwirtschaft Vorarbeitgeber (0190)

Der Infotyp *Bauwirtschaft Vorarbeitgeber* (0190) ist in die Bereiche *Vorarbeitgeber* und *Bescheinigte Werte* untergliedert.

Im Bereich *Vorarbeitgeber* geben Sie den Namen des Vorarbeitgebers mit der zugehörigen Betriebskontonummer und Sozialkasse ein.

Im Bereich *Bescheinigte Werte* erfassen Sie die auf der Lohnnachweiskarte des Arbeitnehmers bescheinigten Werte, wie z.B.:

- *Beschäftigungstage*
- *Urlaubsvergütung*
- *Ausgleich Krankheit/Wehrübung*
- *Ausgleich Kurzarbeit*
- *Ausgleich Überbückungsgeld/Winterausfallgeld*
- *gewährter Urlaub*
- *Resturlaub Vorjahr*

Die bescheinigten Werte sind im Customizing in Lohnarten geschlüsselt.

Die Infotypen Bauwirtschaft Vorarbeitgeber und Bauwirtschaft Sozialkassenverfahren dürfen sich zeitlich nicht überschneiden.

Infotyp Bauwirtschaft Aufwendungen (0191)

Im Infotyp *Bauwirtschaft Aufwendungen* erfassen Sie Daten zur Erstattung von Aufwendungen eines Mitarbeiters.

Zu erstattende Aufwendungen sind

- Auslösungen
- Verpflegungszuschüsse
- Fahrtkosten
- Wochenendheimfahrten

Zunächst geben Sie im Gruppenrahmen *Arbeitsstätte* einen Aufenthaltsort oder eine Baustelle an. Unter *Aufenthaltsort* können mehrere Baustellen am selben Ort zusammengefaßt werden.

Im Gruppenrahmen *Erstattung* geben Sie an, wie häufig der Mitarbeiter von der Arbeitsstelle zu seiner Wohnung zurückkehrt (tägliche Rückkehr, wöchentliche Rückkehr oder Daueraufenthalt), da dies ausschlaggebend für die Erstattung ist.

Abhängig von diesen Eingaben werden jeweils Registerkarten eingeblendet, auf denen Sie die entsprechenden Daten erfassen:

Auslösung

Hier geben Sie den Anspruch des Mitarbeiters auf Auslösung ein, falls er am Einsatzort übernachtet oder wöchentlich zu seiner Wohnung zurückkehrt.

Außerdem erfassen Sie hier bei wöchentlicher Rückkehr die Wochenendheimfahrt.

Verpflegung

Hier erfassen Sie den Anspruch des Mitarbeiters auf Verpflegungszuschuß, wenn er täglich von der Arbeit zu seiner Wohnung zurückkehrt.

Steuer

Hier können Sie unter Berücksichtigung der steuerlichen Bewertung folgende Daten eingeben:

- Einsatzwechseltätigkeit
- Dienstreise
- regelmäßige Arbeitsstätte
- doppelte Haushaltsführung

Beim Anlegen des Infotyps *Bauwirtschaft Aufwendungen* schlägt das System die *Dreimonatsfrist* vor.

Fahrt Wohnung - Arbeit

Hier erfassen Sie die Daten, die ausschlaggebend zur Berechnung der Fahrtkosten sind, wie zum Beispiel:

- Art des Verkehrsmittels
- Entfernungskilometer

- Fahrzeit

Fahrt Unterkunft - Arbeit

Hier können Sie Fahrten zwischen Unterkunft und Arbeitsstätte für die Berücksichtigung möglicher Steuerfreibeträge eingeben. Die Fahrtkosten zwischen Unterkunft und Arbeitsstätte werden nicht automatisch erstattet.

Unterkunft

Hier können Sie die *Übernachtungsart* des Mitarbeiters, wie z.B. Hotel oder Baustellenunterkunft, eingeben.

Ist der Mitarbeiter in einem Wohnheim untergebracht, können Sie die entsprechende Wohnheimnummer und Wohnheimverwaltung mit den zugehörigen Übernachtungskosten angeben.

Siehe auch:

Erstattung bei täglicher Rückkehr zur Wohnung anlegen [Extern]

Erstattung bei wöchentlicher Rückkehr zur Wohnung anlegen [Extern]

Erstattung bei Daueraufenthalt anlegen [Extern]

Infotyp Bauwirtschaft Zuordnung (0192)

Im Infotyp *Bauwirtschaft Zuordnung* ordnen Sie einen Mitarbeiter einer Kolonne zu.

Ist der Mitarbeiter Mitglied in einer Arbeitsgemeinschaft, für die Ihre Firma die Lohnabrechnung durchführt, können Sie den Mitarbeiter einem *Arge-Partner* zuordnen.

Zusätzlich können Sie dem Mitarbeiter ein Modell zur Arbeitszeitflexiblisierung zuordnen.

Über persönliche Attribute können Sie dem Mitarbeiter spezielle Sperren oder weitere Kennzeichen wie die folgenden zuordnen:

- Sperre Baustellenarbeitszeit

  Wenn der Mitarbeiter nicht nach der Arbeitszeitplanregel der Baustelle arbeitet, vergeben Sie das Attribut *Sperre Baustellenarbeitszeit*. Dadurch bleibt der Arbeitszeitplan der Baustelle unberücksichtigt.

- Sperre Kolonnenarbeitszeit

  Wenn der Mitarbeiter nicht nach der Arbeitszeitplanregel der Kolonne arbeitet, vergeben Sie das Attribut *Sperre Kolonnenarbeitszeit*. Dadurch bleibt der Arbeitszeitplan der Kolonne unberücksichtigt.

- Sperre 13. Monatseinkommen

  Wenn der Mitarbeiter kein 13. Monatseinkommen erhält, vergeben Sie das Attribut *Sperre 13. Monatseinkommen*.

- Sperre Lohnausgleich

  Wenn der Mitarbeiter keinen Lohnausgleich erhält, vergeben Sie das Attribut *Sperre Lohnausgleich*.

- Sperre Wintergeld

  Wenn der Mitarbeiter keinen Anspruch auf Wintergeld hat, vergeben Sie das Attribut *Sperre Wintergeld*.

- Sperre Winterbau-Umlage

  Wenn für den Mitarbeiter die Berechnung für Winterbau-Umlage vermieden werden soll, vergeben Sie das Attribut *Sperre Winterbau-Umlage*.

- Sperre Arbeitszeitflexibilisierung

  Wenn der Mitarbeiter von der Verarbeitung zur Flexibilisierung der Arbeitszeit ausgenommen wird, vergeben Sie das Attribut *Sperre Arbeitszeitflexibilisierung*.

- Auslandsbaustelle

  Wenn für einen Mitarbeiter, der ständig auf einer Baustelle im Ausland arbeitet, keine Bewegungsdaten vorhanden sind, vergeben Sie das Attribut *Auslandsbaustelle*. Dadurch werden für diesen Mitarbeiter andere Beiträge zum Sozialkassenverfahren berechnet.

- ULAK Auslernjahr

  Wenn der Mitarbeiter im Auslernjahr eingestellt wird, vergeben Sie das Attribut *ULAK Auslernjahr*. Dadurch hat der Mitarbeiter Anspruch auf den vertraglich festgelegten Urlaub im Auslernjahr.

- ULAK Normalverfahren

Wenn der Mitarbeiter beispielsweise die Ausbildung abgebrochen hat, vergeben Sie das Attribut *ULAK Normalverfahren*. Dadurch hat der Mitarbeiter Anspruch auf den vertraglich festgelegten Urlaub.

- Arbeitskammerbeiträge nach IT 0012

  Wenn der Mitarbeiter üblicherweise auf einer Baustelle in Bremen oder im Saarland beschäftigt ist, vorübergehend jedoch auf eine Baustelle außerhalb der Bundesländer Bremen oder Saarland entsendet wird, vergeben Sie während der Zeit der Entsendung das Attribut *Arbeitskammerbeiträge nach IT 0012*. Dadurch werden weiterhin Arbeitskammerbeiträge für diesen Mitarbeiter abgeführt.

Vermögensbildung Bauwirtschaft

Im Infotyp *Vermögensbildung* (0010) erfassen Sie Daten zu Verträgen der Vermögensbildung, für die nach dem Vermögensbildungsgesetz vom Arbeitgeber vermögenswirksame Leistungen erbracht werden.

Die Sparbeträge zur Vermögensbildung müssen direkt an das Anlageinstitut abgeführt werden. Unter bestimmten Voraussetzungen gewährt der Staat, je nach Anlageart unterschiedlich, Arbeitnehmer-Sparzulagen, die im Rahmen der Einkommensteuererklärung vom Finanzamt ausgezahlt werden.

Stundenlöhner erhalten den Arbeitgeberanteil pro Stunde unter der Voraussetzung, daß sie selbst einen Arbeitnehmeranteil je Stunde aufbringen.

Der Arbeitgeberanteil wird für jeden Abwesenheitstag um einen festen Betrag gekürzt. Die Kürzung gilt für alle Tage, an denen nicht gearbeitet wird, also auch an Tagen der Lohnfortzahlung wegen Krankheit, Urlaub oder Feiertag. Auch bei Eintritt oder Austritt eines Mitarbeiters während des Monats wird der Arbeitgeberanteil gekürzt.

Bei einem Wechsel während des Monats vom Stundenlöhner zum Angestellten bzw. Monatslöhner oder vom Auszubildenden zum Stundenlöhner erhält der Mitarbeiter anteilig beide Arbeitgeberanteile.

Besondere Vertragsformen mit variablem Sparbetrag sind im Infotyp *Vermögensbildung* (0010) im Feld *Auszahlungspriorität* zu kennzeichnen:

- **Vertrag mit einer Festrate**

  Pro Monat wird der im Vertrag fest vereinbarte Betrag (Festrate) vom Arbeitgeber überwiesen.

- **Überlaufvertrag mit einer minimalen Festrate**

  Pro Monat wird mindestens die im Vertrag vereinbarte Festrate überwiesen. Der tatsächliche Sparbetrag richtet sich nach der Anzahl der gearbeiteten Stunden. Übersteigt der tatsächliche Sparbetrag die minimale Festrate, wird auf diesen Vermögensbildungsvertrag mehr als die Festrate überwiesen.

  Kennzeichnen Sie diese Vertragsart im Infotyp *Vermögensbildung* (0010) im Feld *AuszahlungsPriorität* mit dem Wert `6`.

  Verwenden Sie eine Lohnart für variable Vermögensbildung in der Bauwirtschaft.

- **Überlaufvertrag mit einer Begrenzung auf eine maximale Festrate**

  Pro Monat wird ein variabler Betrag, höchstens jedoch die im Vertrag festgesetzte maximale Festrate, überwiesen.

  Kennzeichnen Sie diese Vertragsart im Infotyp *Vermögensbildung* (0010) im Feld *AuszahlungsPriorität* mit dem Wert `5`.

  Verwenden Sie eine Lohnart für variable Vermögensbildung in der Bauwirtschaft.

  Ein Überlaufvertrag mit maximaler Festrate wird nur in Verbindung mit einem Überlaufvertrag mit minimaler Festrate verarbeitet. Der Vertrag mit der Auszahlungspriorität `5` wird dabei vor dem Vertrag mit der Auszahlungspriorität `6` bearbeitet.

Aktivitäten

Voreinstellungen zur Berechnung der Vermögensbildung führen Sie im Customizing durch unter *Personalabrechnung → Abrechnung Deutschland → Branchen → Bauwirtschaft → Besonderheiten der Personalabrechnung Bauwirtschaft → Vermögensbildung*.

France

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

9. For which the payroll is to be run
10. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Actions

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll Accounting

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

Appraisals (Infotype 0025)

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Profit Sharing

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Great Britain

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

Reference Personnel Number Priority (Infotype 0121)

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

11. For which the payroll is to be run
12. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Actions

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Company Loans (Infotype 0045)

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Garnishments

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Social Insurance

Retirement Pension Plan

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value + (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Berechtigungsverwaltung

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Indonesia

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

13. For which the payroll is to be run
14. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Japan

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

15. For which the payroll is to be run
16. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

Appraisals (Infotype 0025)

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Fiscal Data

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Canada

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  - In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  - In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

17. For which the payroll is to be run
18. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Fiscal Data

Garnishments

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Special Benefits Administration

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Mexico

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  - In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  - In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

19. For which the payroll is to be run
20. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

The Netherlands

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Sozialfonds (Infotyp 0063)

Im Infotyp *Sozialfonds Niederlande* (0063) können Sie Daten pflegen, die Anträge von Mitarbeitern auf Unterstützungsmittel aus einem firmeninternen Sozialfonds betreffen.

In der Standardauslieferung ist der Infotyp *Sozialfonds Niederlande* (0063) nicht in die Lohn- und Gehaltsabrechnung integriert. Die hier gepflegten Daten dienen lediglich der Antrags- und Bearbeitungsverwaltung.

Sozialfonds werden eingerichtet, um Mitarbeiter in medizinischen oder sozialen Notlagen im Hinblick auf anfallende Sonderausgaben finanziell zu unterstützen. Die Teilnahme an einem solchen Fonds ist freiwillig. Die Finanzierung erfolgt über Beitragszahlungen der teilnehmenden Mitarbeiter.

Zur Unterscheidung einzelner Arten von Unterstützung verwendet der Infotyp *Sozialfonds Niederlande* (0063) entsprechende Subtypen. In der Standardauslieferung stehen die folgenden Subtypen bzw. Antragsarten zur Verfügung:

- Subtyp 01: *Soziale Beihilfe*
- Subtyp 02: *Ärztliche Beihilfe*

Antragseingang (Ontvangst verzoek)

In dieser Feldgruppe können Sie Daten zum eingegangenen Antrag pflegen. Dazu gehören u.a. zwei laufende Nummern. Während im Feld *Nummer Antrag* (*Nummer verzoek*) eine beliebige Nummer abgelegt werden kann, vergibt das System unter *Objekt-ID* automatisch eine laufende systeminterne Nummer. Diese Nummer zeigt an, den wievielten Antrag der Mitarbeiter eingereicht hat. Das System füllt dieses Feld automatisch. Der Wert kann nicht überschrieben werden.

Antragsbearbeitung (Datum behandeling)

In einer nächsten Stufe können Bearbeitungs- und Entscheidungsvermerke sowie ggf. Einsprüche gegen ergangene Entscheidungen im System abgelegt werden.

Aus- / Rückzahlungen (Betalingen / terugbetalingen)

Auch Informationen zur Aus- sowie ggf. Rückzahlung von Mitteln aus dem Sozialfonds können in diesem Infotyp erfaßt werden.

WBEEA (Infotyp 0177)

Im Infotyp *WBEAA Niederlande* (0177) können Sie Daten pflegen, die für die Ausführung des Gesetzes zur Förderung gleicher Beschäftigungschancen für Angehörige von Minderheiten (*Wet Bevordering Evenredige Arbeidsdeelname Allochtonen - WBEAA*) erforderlich sind. Auf der Grundlage dieser Informationen kann dann zum Jahresende der Jahresbericht für die Handelskammer erstellt werden. Der Jahresbericht schlüsselt die Zahl der Beschäftigten eines Unternehmens sowie die Zahl der Ein- und Austritte innerhalb des Unternehmens u.a. danach auf, ob es sich um Angehörige einer Minderheit handelt oder nicht.

Erfassung Geburtsländer (Registratie geboortelanden)

Über die in dieser Datengruppe abgelegten Informationen ermittelt das System, ob der Mitarbeiter der Zielgruppe des WBEAA-Gesetzes zuzuordnen, d.h. ob er Angehöriger einer Minderheit im Sinne dieses Gesetzes ist. Ist mindestens eines der angegebenen Geburtsländer in der Länderliste enthalten, die durch die allgemeine Verwaltungsvorschrift (*AMVB*) definiert ist, wird der Mitarbeiter als Angehöriger einer Minderheit betrachtet.

Ist das Geburtsland eines oder beider Elternteile oder das des Mitarbeiters unbekannt, wird die Bestimmung auf der Grundlage der bekannten Geburtsländer durchgeführt.

Einspruch erhoben (*Bezwaar aangetekend*):

Der Arbeitnehmer kann gegen die vom Gesetzgeber vorgeschriebene Datenerfassung seitens des Arbeitgebers sowie die damit verknüpfte Auskunftspflicht Einspruch erheben. Dies wird über die Selektion des Feldes *Einspruch erhoben* (*Bezwaar aangetekend*) vermerkt. Die Erfassung von Daten in den übrigen Feldern entfällt in diesem Fall.

- Praktikanten, Mitarbeiter im Zeitarbeitsverhältnis und externe Mitarbeiter sind von der WBEAA-Erfassungspflicht ausgenommen.
- Weitere Daten, die für die Erstellung des Jahresberichts bzw. für die Ausführung des WBEAA-Gesetzes erforderlich sind, sind in den folgenden Infotypen enthalten:
  - Organisatorische Zuordnung (0001)
  - *Daten zur Person* (0002)
  - *Sollarbeitszeit* (0007).

  Der Infotyp *WBEAA* (0177) enthält lediglich Informationen, die speziell im Hinblick auf die WBEAA-Ausführung erforderlich und nicht bereits an anderer Stelle im System abgelegt sind. Diese Daten wurden vom Gesetzgeber als besonders schutzwürdig gekennzeichnet und sind daher einem besonderen Zugriffsschutz unterworfen.
- Um eine Auswertung sämtlicher im Hinblick auf das Gesetz relevanten Daten und die Erstellung des Jahresberichtes zu erhalten, wählen Sie *Personal* → *Personalabrechnung* → *Folgeaktivitäten* → *Jährliche* → *Listen/Statistik* → *Jaarverslag WBEAA*. Alternativ dazu können Sie auf den Report RPLWBAN0 auch über *System* → *Dienste* → *Reporting* zugreifen.

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

21. For which the payroll is to be run
22. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Fiscal Data

Steuerdaten (Infotyp 0060)

Im Infotyp *Steuerdaten Niederlande* (0060) können Sie die Steuerdaten des Mitarbeiters pflegen. Diese Daten werden insbesondere in der Lohn- und Gehaltsabrechnung sowie für eine Reihe von Auswertungen benötigt.

Zusätzliche Daten zur Verwaltung und Verarbeitung einer Reihe von speziellen steuerlichen Sonderregelungen (*Pensioenbreuk*, *Canada regeling*, *Vertraagd loon*) können Sie im Infotyp *Spezielle Regelungen Niederlande* (0317) hinterlegen.

Siehe auch:

Spezielle Regelungen (Infotyp 0317) [Seite 834]

Die Daten des Infotyps *Steuerdaten Niederlande* (0060) lassen sich grob in zwei Gruppen unterteilen. Es handelt sich dabei einerseits um Steuergrunddaten, die für jeden Mitarbeiter vorhanden sein müssen (siehe 1.), sowie andererseits um Informationen, mit denen für einen Mitarbeiter bestimmte steuererleichternde Ausnahmeregelungen definiert werden (siehe 2. und 3.).

1. Steuergrunddaten

- *Steuernummer (SoFi-nummer)*
- *Steuerklasse (Tariefgroep)*
- *Familienstand (Burgerlijke staat)*

  Das Abrechnungsprogramm liest den an dieser Stelle abgelegten Familienstand. Der im Infotyp *Daten zur Person* (0002) erfaßte Familienstand ist für Abrechnungszwecke nicht relevant und dient lediglich zur Information.

- *Berechnungstabelle (Berekeningstabel)*

  Über dieses Feld wird gesteuert, ob für die Ermittlung von *Overhevelingstoeslag* und *Loonheffing* die für Bezüge aus einem aktuellen Arbeitsverhältnis gültige sog. weiße Tabelle oder die für Bezüge aus früheren Arbeitsverhältnissen gültige sog. grüne Tabelle herangezogen werden soll.

- *Zeitraum (Tijdvak)*

  Innerhalb der weißen bzw. grünen Tabelle wird auf einer weiteren Ebene unterschieden zwischen:

  – Monatstabelle
  – Wochentabelle
  – Tagestabelle
  – Vierwochentabelle

  Über dieses Feld steuern Sie die Selektion der gewünschten Tabelle.

- *Jahresgehalt Sonderzahlungen (Jaarloon BT)*

Die Besteuerung von Sonderzahlungen wie z.B. Weihnachtsgeld kann nach einem besonderen, in der weißen bzw. grünen Tabelle festgelegten Prozentsatz des steuerpflichtigen Jahresgehaltes des Vorjahres erfolgen. Für Mitarbeiter, die dem Unternehmen bereits ein Jahr lang angehören, wird dieser Betrag automatisch über die Abrechnung ermittelt. Er kann jedoch überschrieben werden. Für neu in das Unternehmen eingetretene Mitarbeiter muß manuell ein entsprechender Wert erfaßt werden.

- *Einkommenskennzeichen (Incomenscode)*

  Dieses Kennzeichen bezeichnet die Haupteinkommensquelle des Mitarbeiters. Das Feld wird nicht zu Abrechnungszwecken herangezogen. Die hier abgelegten Informationen sind jedoch für die zuständige Finanzbehörde relevant.

- *Besondere Kennzeichen (Speciale aanduiding)*

  Hier können Sie angeben, ob der Mitarbeiter ergänzende Leistungen, wie z.B. einen Firmenwagen, in Anspruch nimmt. Auch dieses Feld wird nicht zu Abrechnungszwecken herangezogen.

2. Abweichende steuerrelevante Sachverhalte für bestimmte Personengruppen

- *Sondergruppen Arbeitnehmer (Speciale groepen werknemers)*

  Für bestimmte Personengruppen wie Heimarbeiter oder Sozialhilfeempfänger, gelten abweichende Steuertabellen bzw. besondere Umrechnungsregeln. Für diese Mitarbeiter dürfen die Felder *Berechnungstabelle* (*Berekeningstabel*) und *Umrechnungsregel* (*Herleidingsregel*) nicht gefüllt werden.

- Gewissensgründe (Gemoedsbezwaarde)

  Der Gesetzgeber bietet dem Arbeitnehmer die Möglichkeit, sich aus Glaubens- oder Gewissensgründen von der Entrichtung von Geldern befreien zu lassen, über die beispielsweise die sog. *Volksverzekeringen* (Sozialhilfe etc.) finanziert werden. Der darauf entfallende Betrag ist statt dessen als Lohnsteuer abzuführen.

- *Umrechnungsregel (Herleidingsregel)*

  Für bestimmte Personengruppen gelten abweichende Steuer- und Beitragssätze. Zu diesen Personengruppen zählen z.B. Langzeitarbeitslose, die unter die Regelungen des *Wet Kaderregeling Arbeidsinpassing* fallen oder ausländische Steuerpflichtige. Aus diesem Grund wird für solche Personen im Anschluß an die Ermittlung der Nettobezüge eine entsprechende Umrechnung durchgeführt. In diesem Feld wird geschlüsselt, nach welcher Regel diese Umrechnung erfolgen soll.

- *Besondere Unkostenregelung (Speciale onkostenregeling)*

  Ausländische Arbeitnehmer, die nur zeitlich befristet in den Niederlanden arbeiten, genießen einen besonderen Steuervorteil. Gemäß der 35-%-Regelung (*35%-regeling*) unterliegen lediglich 35% ihrer Gesamtbezüge der Steuerpflicht. Der verbleibende Anteil der Bruttobezüge wird netto ausbezahlt.

- Vorteilsklausel (Voordeelregel)

  Bei Mitarbeitern, die neben ihren regelmäßigen Bezügen auch einmalige, ergänzende Zahlungen erhalten, kann für die Besteuerung dieser Sonderzahlungen grundsätzlich eines der folgenden beiden Verfahren angewendet werden:

  – Besteuerung nach der Sonderzahlungstabelle (*tabel bijzondere beloningen)*

Die Besteuerung der Sonderzahlung erfolgt mit einem Prozentsatz, der abhängig ist vom Jahresgehalt des Vorjahres (abzüglich eventueller steuerbehördlicher Verfügungen, die eine abweichende, niedrigere Besteuerungsgrundlage begründen).

– Besteuerung nach der allgemeinen Tabelle (*tabel loonbelasting / premie volksverzekeringen*)

  Die Besteuerung der Sonderzahlung erfolgt regulär nach der allgemeinen Tabelle.

Gemäß der sogenannten *Voordeelregel* kann nun für den Mitarbeiter die im konkreten Einzelfall steuerlich günstigste Regelung gewählt werden:

Die allgemeine Tabelle kann herangezogen werden, wenn die Besteuerung der Sonderzahlung nach der allgemeinen Tabelle günstiger ist als die Besteuerung nach der Sonderzahlungstabelle, die eigentlich für die Veranschlagung von Sonderzahlungen vorgesehen ist.

Eine Reihe von Mitarbeitern wie z.B. ausländische Arbeitnehmer sind von der Inanspruchnahme der *Voordeelregel* ausgenommen. Dieser Sachverhalt wird über das Feld *Geen voordeelregel* abgebildet, über das der einzelne Mitarbeiter von der Vorteilsklausel ausgeschlossen werden kann. Dafür sind entsprechende Einstellungen im Customizing erforderlich.

3. Behördliche Verfügungen

Unter gegebenen Umständen kann ein Mitarbeiter bei der zuständigen Steuerbehörde eine steuerliche Ausnahmeregelung beantragen. Solche behördlichen Verfügungen gelten in der Regel für die Dauer eines Jahres.

Im Feld *Verfügungskennzeichen* (*Code beschikking*) wird angezeigt, um welche Art von Verfügung es sich handelt. Das System vergibt automatisch das entsprechende Kennzeichen in Abhängigkeit von den in dieser Feldgruppe erfaßten Werten.

In der *Personalwirtschaft* können Sie folgende Verfügungen berücksichtigen:

- Abweichende Besteuerungsgrundlage für Sonderzahlungen

  Das Datum der Verfügung und die Höhe des zugrunde gelegten steuerpflichtigen Jahresgehaltes werden in den Feldern *Verfügung Steuerbehörde* (*Machtiging inspecteur*) und *Abweichung Sonderzahlungen* (*Afwijkend bijzonder tarief*) abgelegt.

- Verminderte *Loonheffing* wegen Abzugsposten

  Erwartet der Mitarbeiter beispielsweise am Jahresende eine größere Steuerrückzahlung, so hat er die Möglichkeit, schon im Vorfeld einen Ausgleich zu schaffen, indem bei der Berechnung der Steuer für Sonderzahlungen ein abweichendes Jahresgehalt zugrunde gelegt wird.

  Die für die Abzugsposten relevanten Daten werden in den folgenden Feldern eingegeben:

  – *Verfügung Abzugsposten (Beschikking Aftrekposten)*

  – *Betrag pro Jahr (Bedrag per jaar)*

  – *Betrag pro Periode (Bedrag per periode)*

Hypothek Eigenheim

- Abweichende Steuerklasse

  Genehmigt die Finanzbehörde die Zuordnung des Mitarbeiters zu einer anderen Steuerklasse, können Sie diesen Sachverhalt in den Feldern *Verfügung Steuerklasse* (*Beschikking Tarifgroep*) und *Abweichende Steuerklasse* (*Afwijkende tariefgroep*) erfassen.

- Abweichende Umrechnungsregel

  Nicht versicherungspflichtige ausländische Steuerzahler können eine günstigere Umrechnungsregel beantragen. Das Datum der entsprechenden Verfügung sowie die abweichende Umrechnungsregel werden in den Feldern *Verfügung Tarif Ausland* (*Beschikking buitenlands tarief*) und *Abweichende Umrechnungsregel* (*Afwijkende herleidingsregel*) gepflegt.

Über den Report RPIBBLN0 können Sie eine Reihe von Feldern des Infotyps *Steuerdaten Niederlande* (0060) zurücksetzen:

So werden u.a. die Infotypsätze der Mitarbeiter, für die Ausnahmeregelungen genehmigt wurden, bei Ablauf der einjährigen Gültigkeitsperiode abgegrenzt und zurückgesetzt. Wird für den Mitarbeiter erneut eine Ausnahmeregelung genehmigt, so ist dies durch Hinzufügen eines neuen Satzes im System abzubilden. Auch der im Feld *Jahresgehalt Sonderzahlungen* (*Jaarloon BT*) enthaltene Wert wird über diesen Report zurückgesetzt.

Um auf das Einstiegsbild für die Programmausführung zu gelangen, wählen Sie *System* → *Dienste* → *Reporting.*

- Bei entsprechender Einstellung im Customizing füllt das System eine Reihe von Feldern automatisch mit Vorschlagswerten. Die Vorschlagswerte sind abhängig von der Zuordnung zu Mitarbeitergruppe und Mitarbeiterkreis, wie sie für den Mitarbeiter im Infotyp *Organisatorische Zuordnung* (0001) definiert wurde. Sie werden über das Merkmal NLSTD bestimmt.
- Beachten Sie, daß die Erfassung der Informationen des Infotyps *Organisatorische Zuordnung* (0001) daher zeitlich vor der Pflege des Infotyps *Steuerdaten Niederlande* (0060) erfolgen muß.
- Änderungen der Daten dieses Infotyps sind auch während der laufenden Abrechnungsperiode möglich. Für den Abrechnungslauf als solchen wird jedoch lediglich der aktuelle, d.h. zuletzt erfaßte Satz herangezogen. Die Möglichkeit eines Splitts ist nicht vorgesehen.

Prämiennachlaß (Infotyp 0303)

Im Infotyp *Prämiennachlaß Niederlande* (0303) können Sie Daten zu Nachlässen auf die Abgaben zur *Loonheffing* pflegen, die das Unternehmen an die zuständige Steuerbehörde abzuführen hat. Die in diesem Infotyp abgelegten Informationen dienen der Verwaltung und Ermittlung der für den einzelnen Mitarbeiter in Anspruch genommenen Nachlässe. Die Daten sind somit in erster Linie für die Lohn- und Gehaltsabrechnung von Bedeutung.

Zum 1. Januar 1996 hat der Gesetzgeber ein Gesetz zur Senkung der Abgaben zur Lohnsteuer und zu den *Volksverzekeringen* (*Wet vermindering afdracht loonbelasting/premieheffing)* und den diesbezüglichen Ausführungsvorschriften (*Uitvoeringsregeling afdrachtvermindering)* in Kraft gesetzt. Darin wird für den Arbeitgeber die Möglichkeit geschaffen, für Angehörige bestimmter Personengruppen einen reduzierten Abgabensatz in Anspruch zu nehmen. Dieser Nachlaß bezieht sich ausschließlich auf die Abgaben, die der Arbeitgeber an das Finanzamt abzuführen hat. Für den Mitarbeiter selbst ergeben sich keine Steuer- oder Abgabenvorteile. Ziel des Prämiennachlasses ist es, dem Arbeitgeber einen Anreiz zur Einstellung schwer vermittelbarer Arbeitnehmer zu schaffen und dadurch deren Beschäftigungschancen zu erhöhen. Ein Prämiennachlaß ist u.a. vorgesehen für:

- Geringverdiener:

  Mitarbeiter, deren Bezüge einen gesetzlich festgelegten Betrag unterschreiten.

  Bei Arbeitnehmern, die mindestens 23 Jahre alt sind und deren Bezüge zu einem späteren Zeitpunkt die für die Geringverdiener-Regelung festgesetzte Bemessungsgrenze überschreiten, kann die Inanspruchnahme der Regelung unter bestimmten Umständen anteilig fortgesetzt werden, und zwar für die Dauer von maximal 24 Monaten (sog. *Doorstroomregeling*).

- Langzeitarbeitslose:

  Mitarbeiter, die länger als 12 Monate und ohne Unterbrechungen beim Arbeitsamt (*Regionaal Bestuur voor de Arbeidsvoorziening - RBA)* arbeitslos gemeldet waren, sowie Mitarbeiter, die das Gesetz als diesen gleichgestellt betrachtet. Das Arbeitsverhältnis muß auf eine Dauer von mindestens 12 Wochen mit einer minimalen Wochenarbeitszeit von 15 Stunden angelegt sein.

- An Ausbildungs-/Berufsbildungsmaßnahmen teilnehmende Mitarbeiter:

  Mitarbeiter, die in einer berufsbegleitenden Ausbildung stehen, wie z.B.

  – Teilnehmer einer berufspraktischen Ausbildung im Rahmen von *Beroepspraktijkvorming* bzw. *Leerlingwezen* gemäß den Bestimmungen des Berufsbildungsgesetzes (*Wet educatie en beroepsonderwijs)*;

  – Hochschulassistenten und Wissenschaftler mit Ausbildungsstatus (*assistenten in opleiding - aio's* bzw. *onderzoekers in opleiding - oio's*) im Sinne des Hochschulgesetzes *Wet op het hoger onderwijs en wetenschappelijk onderzoek* und den damit in Zusammenhang stehenden Bestimmungen des *Rechtspositiereglement wetenschappelijk onderwijs en onderzoek*;

  – Hochschulabsolventen, die im Rahmen eines Arbeitsverhältnisses bei einem privatwirtschaftlichen Unternehmen bzw. dem Niederländischen Institut für angewandte naturwissenschaftliche Forschung (*Nederlandse organisatie voor toegepast natuurwetenschappelijk onderzoek - TNO*) an einer Promotion arbeiten.

Die Höhe des Nachlaßbetrages wird auf der Grundlage des im jeweiligen Abrechnungszeitraum bezogenen Entgeltes aus aktuellen Dienstverhältnissen ermittelt, wie es in Spalte 14 *(Loon voor de loonbelasting/premie volksverzekeringen*) des Lohnkontos (*Loonstaat)* eingeht.

Der Prämiennachlaß kann vom Arbeitgeber direkt, d.h. ohne Vorliegen einer entsprechenden steuerbehördlichen Genehmigung, in Anspruch genommen werden. Das Unternehmen ist jedoch verpflichtet, eine Reihe von administrativen Auflagen seitens des Gesetzgebers zu erfüllen, z.B.

- die Hinterlegung einer Kopie des den Prämiennachlaß begründenden Dokumentes wie
  - Bescheinigung für Langzeitarbeitslose
  - vertragliche Vereinbarung zwischen Mitarbeiter und Bildungseinrichtung bzw. beteiligtem Unternehmen
- die Aufnahme der für die einzelnen Mitarbeiter gewährten Nachlässe in die Lohnbuchhaltung innerhalb von zwei Monaten nach Ablauf des Kalenderjahres

Die *Personalwirtschaft* unterstützt die folgenden Arten von Prämiennachlaß:

- Prämiennachlaß für Geringverdiener (*Deelname lage lonen*)
- Prämiennachlaß für Langzeitarbeitslose (*Deelname langdurig werklozen*)

  Entsprechend den gesetzlichen Vorgaben kann dieser Nachlaß nicht mit einem gleichzeitigen Nachlaß für an Ausbildungs-/Berufsbildungsmaßnahmen teilnehmende Mitarbeiter gekoppelt werden.
- Prämiennachlaß für an Ausbildungs-/Berufsbildungsmaßnahmen teilnehmende Mitarbeiter (*Deelname onderwijs*)

  Diese Nachlaßart kann nicht mit einem gleichzeitigen Nachlaß für Langzeitarbeitslose einhergehen.

  Änderungen der Daten dieses Infotyps, die sich auf einen bereits abgerechneten Zeitraum beziehen, stoßen automatisch für den Mitarbeiter eine Rückrechnung an.

Spezielle Regelungen (Infotyp 0317)

Im Infotyp *Spezielle Regelungen Niederlande* (0317) können Sie Daten des Mitarbeiters pflegen, wie sie in der Lohn- und Gehaltsabrechnung für die Verwaltung und Verarbeitung einer Reihe von speziellen steuerlichen Sonderregelungen benötigt werden. Dieser Infotyp stellt somit eine Ergänzung des Infotyps *Steuerdaten Niederlande* (0060) dar.

Siehe auch:

Steuerdaten (Infotyp 0060) [Seite 828]

Zur Unterscheidung der einzelnen Sonderregelungen verwendet der Infotyp *Spezielle Regelungen Niederlande* (0317) entsprechende Subtypen. In der Standardauslieferung stehen die folgenden Subtypen zur Verfügung:

- Subtyp 0001: *Pensioenbreuk*

  Zielgruppe der Sonderregelung *Pensioenbreuk* sind pensionierte Mitarbeiter, die

  – im Ausland einen Pensionsanspruch erworben haben

  – im Ausland leben und dort ihre Pension beziehen, unabhänging davon, in welchem Land sie ihren Pensionsanspruch erworben haben

  Um eine doppelte Besteuerung zu vermeiden, hat das Unternehmen die Möglichkeit, der Berechnung von *Overhevelingstoeslag* und *Loonheffing* lediglich einen Teil der Pensionsbezüge zugrunde zu legen.

  Die Sonderregelung *Pensioenbreuk* bezieht sich somit auf *Loonheffing* und *Overhevelingstoeslag*.

- Subtyp 0002: *Canada regeling*

  Zielgruppe der Sonderregelung Kanada sind pensionierte Mitarbeiter mit Wohnsitz in Kanada, die während ihrer aktiven Dienstzeit als Mitarbeiter eines niederländischen Unternehmens in Kanada tätig waren, sich jedoch eine Altersversorgung über eine niederländische Pensionskasse aufgebaut haben. Um eine Doppelbesteuerung der Pensionsbezüge zu vermeiden, hat der Gesetzgeber diese Sonderregelung erlassen.

  Die Sonderregelung Kanada wirkt sich auf die Ermittlung der *Loonheffing* aus, *Overhevelingstoeslag* und SV-Prämien sind jedoch nicht betroffen.

- Subtyp 0003: *Vertraagd loon*

  Die Sonderregelung *Vertraagd loon* deckt die Fälle ab, in denen ein Mitarbeiter über mehrere Abrechnungsperioden hinweg keine Bezüge erhalten hat und diese Bezüge statt dessen zu einem späteren Zeitpunkt in Form einer Sammelauszahlung bekommt. Da die nachträgliche Ermittlung der zugrundezuliegenden SV-Tage und SV-Maxima problematisch ist, wird hier auf SV-Berechnungen verzichtet. Deshalbt läßt sich die Sonderregelung *Vertraagd loon* ausschließlich auf pensionierte Mitarbeiter anwenden.

  Die Sonderregelung *Vertraagd loon* bezieht sich lediglich auf die Berechnung der *Loonheffing*, nicht aber auf die Ermittlung von *Overhevelingstoeslag* und SV-Prämien. Die Ermittlung wird bei einer Sammelauszahlung *Vertraagd loon* nicht durchgeführt.

Betrag oder Anzahl

- Subtyp 0001: *Pensioenbreuk*

In dieser Datengruppe wird der Prozentsatz der Pensionsbezüge hinterlegt, der für die Ermittlung von *Loonheffing* und *Overhevelingstoeslag* anzuwenden ist.

- Subtyp 0002: Canada regeling

  Das System zieht für diesen Subtyp als Prozentsatz automatisch die personenübergreifend gültige Konstante (derzeit 15 %) heran. Ein entsprechendes Eingabefeld *Anzahl / Einheit* entfällt.

- Subtyp 0003: Vertraagd loon

  An dieser Stelle ist die Anzahl der Abrechnungsperioden anzugeben, für die die Sammelauszahlung *Vertraagd loon* erfolgen soll.

  - Die eigentlichen Lohnarten, die für die Sammelauszahlung relevant sind, werden über den Infotyp *Ergänzende Zahlungen* (0015) eingegeben. Welche Lohnarten für diese Auszahlungsart in Frage kommen, ist abhängig von den Einstellungen im Customizing.
  - Beachten Sie, daß für einen Abrechnungslauf mit *Vertraagd loon*-Berechnung als Grundlage das Abrechnungsschema NV00 zu verwenden ist.

Kommentar

Zu jedem Subtypsatz, d.h. zu jeder Sonderregelung, die für den Mitarbeiter in Anspruch genommen wird, kann im System ein beliebiger Kommentartext hinterlegt werden.

- Änderungen der Daten dieses Infotyps sind auch während der laufenden Abrechnungsperiode möglich. Für den Abrechnungslauf als solchen werden jedoch lediglich die am letzten Tag der Abrechnungsperiode gültigen Daten der einzelnen Subtypen herangezogen. Diese Daten werden dann der gesamten Periode zugrunde gelegt.
- Finden auf einen Mitarbeiter mehrere der obengenannten Sonderregelungen Anwendung, so werden diese in der folgenden Reihenfolge in der Berechnung berücksichtigt:
  1. Vertraagd loon
  2. Pensioenbreuk
  3. Canada regeling

Insurance

Pensionen (Infotyp 0110)

Im Infotyp *Pensionen Niederlande* (0110) können Sie Daten zu den Pensionsregelungen des Mitarbeiters pflegen. Diese Daten werden insbesondere in der Lohn- und Gehaltsabrechnung benötigt.

Ergänzend zur gesetzlichen Rentenversicherung (*Algemene Ouderdomswet - AOW*) hat der Arbeitnehmer die Möglichkeit, über eine betriebliche Altersversorgung bzw. Pensionskasse eine zusätzliche Alterssicherung aufzubauen. Die entsprechenden Prämien werden im Abrechnungslauf ermittelt. Relevant sind dafür Daten dieses Infotyps. Im Infotyp wird hinterlegt, an welchen Pensionsregelungen der Mitarbeiter teilnimmt und ob bzw. in welcher Form eine Prämienpflicht besteht.

Pensionen (Pensioenen)

Für jeden Mitarbeiter können in der Personalwirtschaft mehrere Pensionsregelungen gepflegt werden. Um die gewünschte Art der Regelung zu definieren, geben Sie ein Pensionskennzeichen im Feld *Pensionskennzeichen* (*Pensioencode*) ein. Welche Pensionsarten an dieser Stelle zur Auswahl stehen, ist abhängig von den Einstellungen im Customizing.

Das Feld *Prämienpflichtkennzeichen* (*Premieplichtcode*) enthält mit den folgenden Prämienpflichtvarianten zentrale Informationen:

- Kennzeichen 0: Es wird keine Prämie erhoben, eine Prämienpflicht erübrigt sich somit.
- Kennzeichen 1: Es besteht Prämienpflicht, die Prämie wird vom Arbeitgeber bzw. Arbeitnehmer entrichtet.
- Kennzeichen 2: Es ist eine Prämienneuberechnung erforderlich.

  Je nach den Vorgaben der Pensionskasse haben Sie für die Ermittlung der Prämie folgende Möglichkeiten:

  - Berechnung auf Periodenbasis

    Die Prämie wird für jede Abrechnungsperiode neu ermittelt.

  - Berechnung auf Jahresbasis

    Die Prämie wird zum Jahresbeginn für das gesamte Jahr berechnet und dann in gleichen Raten periodisch abgezogen.

  Erfolgen bei der zweiten Methode beispielweise Änderungen in den Bezügen des Mitarbeiters, wird eine Neuberechnung der Prämien entsprechend den veränderten Grundlagen erforderlich.
- Kennzeichen 3: Die Prämie wird "manuell" über eine eigene Benutzerlohnart mit entsprechender Verarbeitungsklasse ermittelt. Diese Lohnart ist im Customizing entsprechend zu schlüsseln.

Für die Abrechnung benötigt das System darüber hinaus Angaben, zu welchem Anteil der Mitarbeiter an der Pensionsregelung teilnimmt. Für Teilzeitkräfte kann dieser Anteil von dem im Infotyp *Sollarbeitszeit* (0007) definierten Arbeitszeitanteil abweichen, d.h. sie nehmen u.U. voll an der Pensionsregelung teil. Dieser Sachverhalt wird im Feld *Zeitanteil* (*Deeltijd*) erfaßt.

Pensionen (Infotyp 0110)

Ausschlaggebend für den Prozentsatz, zu dem der Mitarbeiter an der Pensionsregelung teilnimmt, ist der im Infotyp *Pensionen Niederlande* (0110) abgelegte Wert. Wird hier auf die Angabe eines Wertes verzichtet, so zieht das System automatisch den Wert 100% heran. Der im Infotyp *Sollarbeitszeit* (0007) definierte Arbeitszeitanteil ist für die Ermittlung der Pensionsprämien nicht relevant.

Sozialversicherung (Infotyp 0059)

Im Infotyp *Sozialversicherung Niederlande* (0059) können Sie die Sozialversicherungsdaten des Mitarbeiters pflegen. Diese Daten werden insbesondere in der Lohn- und Gehaltsabrechnung sowie für eine Reihe von Auswertungen benötigt.

Die Sozialversicherungsdaten stellen zentrale Informationen zur Ermittlung der Prämien für die folgenden Versicherungen dar:

- Sozialversicherungen
  - *Ziektewet* (ZW)
  - *Werkeloosheidswet* (WW)
  - *Wet op de Arbeidsongeschiktheidsverzekering* (WAO)
- Krankenversicherung
  - *Ziekenfondswet* (ZFW) bzw. *Ziektekostenverzekering* (ZKV)

Auch ergänzende Sozialleistungen, die unternehmensspezifisch angeboten werden, sind hier berücksichtigt.

SV-Prämien (SV-premies)

Diese Feldgruppe enthält Daten zu den gesetzlichen Sozialversicherungen *ZW*, *WW* und *WAO*. Während die eigentliche Prämienermittlung im Abrechnungslauf erfolgt, werden dem System an dieser Stelle nähere Informationen zur Berechnungsmethode sowie zur Beitragspflicht mitgegeben.

Zunächst werden Mitarbeiter, für die die gleichen sozialversicherungsrechtlichen Regelungen gelten, im Feld *SV-Gruppe* einer Gruppe zugeordnet, in der Regel einer *Bedrijfsvereniging*. Im Feld *SV-Tage* hinterlegen Sie, ob die für die Abrechnung relevante Anzahl der SV-Tage auf Durchschnittsbasis gebildet oder ob die tatsächliche Anzahl herangezogen werden soll. Im Feld *SV-Methode* können Sie angeben, ob die Prämienermittlung über eine periodische oder kumulative Berechnung erfolgen soll.

Extra-SV (Extra SV)

Ergänzend zu den obengenannten gesetzlichen Sozialversicherungen *ZW*, *WW* und *WAO* bietet Ihr Unternehmen möglicherweise ergänzende Sozialleistungen an. In diesem Infotyp können für jeden Mitarbeiter bis zu fünf solcher Leistungen gepflegt werden. Dabei stehen jeweils unterschiedliche Prämienpflichtvarianten zur Verfügung.

Welche unternehmensinternen Sozialleistungen an dieser Stelle gewählt werden können, ist abhängig von den Einstellungen im Customizing.

Ergänzende Sozialleistungen sind u.a. denkbar für:

- WAO-gat
- VUT / SOM

Krankenversicherung (Ziektekostenverzekering)

Die Art des Krankenversicherungsschutzes eines Mitarbeiters hängt in erster Linie von der Höhe seines Einkommens und davon, ob das Unternehmen eine Gruppenversicherung abgeschlossen hat. Entsprechend bildet die Komponente *Personalwirtschaft* die folgenden drei Krankenversicherungsarten ab:

- Gesetzliche Krankenversicherung: *Ziekenfondswet - ZFW*

  Mitarbeiter, deren Bezüge zum Stichtag 1. November des laufenden Jahres unterhalb einer gesetzlich festgesetzten Bemessungsgrenze liegen, sind pflichtversichert im Sinne des Krankenversicherungsgesetzes.

  Eine Liste der Mitarbeiter, die diese Bemessungsgrenze erreicht haben, liefert der Report RPLZFWN0. Um diesen Report zu starten, wählen Sie *System* → *Dienste* → *Reporting*.

  Im Feld *Kennzeichen Krankheitskosten* (*Code Ziektekosten*) definieren Sie die Art der Beitragspflicht:

  – Beitragspflicht allein beim Arbeitgeber

  – Beitragspflicht allein beim Mitarbeiter

  – Beitragspflicht anteilig bei beiden Parteien

  – Mitarbeiter beitragsbefreit

Anhand dieser Angaben ermittelt das Abrechnungsprogramm für den Mitarbeiter die Höhe des Abzuges.

- Private Individualkrankenversicherung

  Mitarbeiter, deren Bezüge zum Stichtag 1. November des laufenden Jahres über der gesetzlich festgesetzten Bemessungsgrenze liegen, können sich privat bei einem Versicherer ihrer Wahl versichern.

  Um die private Krankenversicherung zu definieren, können Sie im Feld *Kennzeichen Krankheitskosten* (*Code Ziektekosten*) ein entsprechendes Kennzeichen angeben. Weitere Daten für diese Versicherungsart enthalten die folgenden Felder:

  – *Prämienklasse (Premieklasse)* bzw. *ZKV-Prämie (ZKV-premie)*:

    Um die Höhe des Beitrages zu bestimmen, können Sie entweder im Feld *Prämienklasse* (*Premieklasse*) eine Beitragsklasse angeben oder im Feld *ZKV-Prämie (ZKV-premie)* einen Betrag eingeben.

    Anders als das Feld *KV-groep* (*KV-Gruppe)* im Infotyp *Familie / Bezugsperson* (0021) ist das entsprechende Feld *ZKV-Gruppe* (*ZKV-groep*) im Infotyp *Sozialversicherung Niederlande* (0059) nicht eingabebereit, da der Infotyp Sozialversicherung nicht für die Daten mitversicherter Angehöriger, sondern lediglich für Daten des Mitarbeiters selbst vorgesehen ist. Somit erübrigt sich eine Spezifizierung der versicherten.

  – *AG-Beitrag ZKV (Bijdrage ZKV WG)*:

Abhängig davon, ob die Höhe des Beitrages wie oben beschrieben über eine Beitragsklasse oder in Form eines konkreten Betrages angegeben wird, können Sie in diesen beiden Feldern den Arbeitgeberbeitrag zur privaten Krankenversicherung des Mitarbeiters ablegen. Sie können entweder über die Eingabe eines entsprechenden Kennzeichens im linken Feld den dazugehörigen Betrag automatisch vom System ermitteln lassen (rechtes Feld) oder aber bei entsprechendem Kennzeichen im linken Feld den gewünschten Betrag manuell im rechten Feld erfassen.

– *Einbehalt Prämie (Inhouding premie)*:

  In diesem Feld können Sie durch ein entsprechendes Kennzeichen für die private Indivualkrankenversicherung angeben, daß vom Arbeitgeber keine Prämie einbehalten wird, sondern der Mitarbeiter selbst die Versicherungsprämie entrichtet.

- Private Gruppenkrankenversicherung

  Mitarbeiter, deren Bezüge zum Stichtag 1. November des laufenden Jahres oberhalb der gesetzlich festgesetzten Bemessungsgrenze liegen, können sich bei Bestehen einer entsprechenden Gruppenversicherung auch über den Arbeitgeber versichern.

  Sie können die Daten in den unter “Private Individualkrankenversicherung” beschriebenen Feldern pflegen.

  Im Feld *Einbehalt Prämie* (*Inhouding premie*) müssen Sie in diesem Fall jedoch angeben, daß die Versicherungsprämie nicht vom Mitarbeiter entrichtet wird, sondern vom Arbeitgeber einbehalten und an den Versicherer abgeführt wird.

  - Um die korrekte Eingabe der für die gewählte Versicherungsart relevanten Felder sicherzustellen, führt das System umfangreiche automatische Verprobungen durch.
  - Bei entsprechender Einstellung im Customizing füllt das System die Felder der Gruppe SV-Prämien sowie das Feld *Kennzeichen Krankheitskosten* (*Code Ziektekosten*) automatisch mit Vorschlagswerten. Die Vorschlagswerte sind abhängig von der Zuordnung zu Buchungskreis, Mitarbeitergruppe und Mitarbeiterkreis, wie sie für den Mitarbeiter im Infotyp *Organisatorische Zuordnung* (0001) definiert wurde. Sie werden über das Merkmal NLSVD bestimmt.
  - Beachten Sie, daß die Pflege des Infotyps *Organisatorische Zuordnung* (0001) daher zeitlich vor der Pflege des Infotyps *Sozialversicherung Niederlande* (0059) erfolgen muß.
  - Änderungen der Daten dieses Infotyps sind auch während der laufenden Abrechnungsperiode möglich. Für den Abrechnungslauf als solchen wird jedoch lediglich der aktuelle, d.h. zuletzt erfaßte Satz herangezogen. Die Möglichkeit eines Splitts ist nicht vorgesehen.

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Austria

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person Infotype 0021

Definition

You record the data on the employee's family members or relatives in this infotype. In addition to personal data, you can also record specifications for sickness certificates and for social insurance.

On the basis of the employee's data, the provides default values for the following fields:

- Last name
- Sex
- Name prefix (if applicable)

When you create an infotype record for an employee's child, you can also store *Other Specifications for Child.* In addition, the system automatically provides the *Child no.* field for processing. If you choose *Family allowance*, you enter the overview screen in which the records for Family Allowance infotype 0043 [Seite 915] are displayed. These records were created at an earlier time.

Use

The system uses the data for various person-related evaluations.

When issuing the sickness certificate for the spouse or the children, the system evaluates the entries in the following fields:

- *Entitlement* (This field must contain the value `01` if you want to issue a sickness certificate for an insured family member using *Sickness Certs. A* infotype 0056.)
- *Authorization no.*
- *SI number*

In payroll, the system uses the data on the children to determine the following values:

- Accommodation allowance
- Non-monetary child bonus
- Monetary child bonus
- Possible amount of family allowance (for companies that pay out the family allowance directly to their employees)

The entry of data on the employee's children is a prerequisite for processing *Family Allowance A* infotype (0043).

Integration

In *Family Allowance A* infotype (0043), you can refer to the child's basic data from *Family/Related Person* infotype 0021 using the appropriate *child number.*

If you delete a child from *Family/Related Person* infotype 0021 for which data is also saved in *Family Allowance A* infotype 0043 is saved, a dynamic action deletes the data for this child in *Family Allowance A* infotype (0043) as well.

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

23. For which the payroll is to be run
24. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Company Loans (Infotype 0045)

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Sickness Certificates

Sickness Certificates A Infotype (0056)

Definition

In *Sickness Certs A* infotype (0056) you record and print all types of sickness certificates (for general practitioners, specialists, dentists, and vacation) for your employees and their family members.

For each quarter you can record up to 15 sickness certificates for each employee/family member. In the infotype you can display and edit the sickness certificate that has been recorded and printed for an employee/family member in a certain quarter. This means that the display is limited to the data for the individual person.

Some employee groups are required to pay a fee for sickness certificates issued for general practitioners, specialists, and dentists. If you record a sickness certificate for a person who is not required to pay this fee, enter the reason for this exemption in the *Exemption* field. If an exemption reason is listed, during the payroll run, the system does not deduct a fee for the sickness certificate from the employee's earnings. Vacation sickness certificates and duplicates do not require fees.

If you want to create a duplicate for the sickness certificate, activate the *Dp* field (Duplicate indicator).

With the address type that you enter in the *Ad* field, you refer to the address that is stored in the *Addresses* infotype (0006).

If you want to create a sickness certificate for the **primarily insured person**, the following prerequisites must be filled:

- *Personal Data* infotype (0002) exists for the primarily insured person in the specified validity period.
- In *Social Insurance A* infotype (0044) the insured person's social insurance number has been entered and saved.
- The address type that you enter in the *Ad* field in *Sickness Certs A* infotype (0056) is stored in the *Addresses* infotype (0006) for the employee during the specified validity period.

If you want to create a sickness certificate for a **dependent**, the following prerequisites must be filled:

- *Family/Related Person* infotype (0021) exists for the primarily insured person in the specified validity period.
- In *Family/Related Person* infotype(0021), the *Entitled* (Entries for sickness certificate) field contains the value **01** (Sickness certificate submitted) and the *SI-Number* (Entries for social insurance) field contains the dependent's social insurance number.

- The address types that you enter in the *Ad* field in *Sickness Certs A* infotype (0056) are stored in *Addresses* infotype (0006) for the employee.

Structure

In order to identify the individual family members, this infotype is divided into different subtypes. The following subtypes have been set up in the SAP standard system:

- Subtype 0 Primarily insured person
- Subtype 1 Insured spouse
- Subtype 2 Insured child
- Subtype 3 Insured legal guardian
- Subtype 4 Insured testator
- Subtype 5 Insured guardian
- Subtype 6 Insured step-child

You can set up more subtypes in Customizing.

Integration

The system derives the personal data for the **primarily insured** (*FamMember* **0**) from *Personal Data* infotype (0002) and *Social Insurance A* infotype (0044).

The system derives the default values for **Dependents** from *Family/Related Person* infotype (0021). If children are insured, the system also reads the child's number from the infotype.

Garnishments

Garnishment/Cession A Infotype (0131)

Definition

In this infotype you enter the administration data for certain garnishment types and cessions. Entering this data is a prerequisite for the creation of other infotypes for garnishment/cession.

The *Garnishment/Cession A* infotype (0131) contains the initial screen *Administration Data* and the subsequent screens *Additional Administration* and *Correspondence*. You can only save the data you have entered by saving in the initial screen.

> Before you enter data in this infotype for the first time, ensure that the employee's data has already been entered in *Organizational Assignment* infotype (0001). In addition, ensure for that the value **Active** is entered in the the *EE group* field in *Organizational Assignment* infotype (0001) for the employee. You cannot enter garnishment/cession data for an employee who has left the company.

Use

The recorded data is used in payroll and in reporting (for example, for the third-party's declaration).

Structure

Subtypes

The infotype is divided into different garnishment types. The garnishment type and the garnishment number represent a subtype. The following subtypes have been set up in the standard:

- Subtype 1 Standard garnishment
- Subtype 2 Preferred garnishment (support payments)
- Subtype 4 Garnishment/Cession
- Subtype 4 Pledge

You can set up more garnishment types in Customizing.

Initial screen: Administration Data

- **Garnishment type/number**

  The system provides a garnishment number. Only overwrite this number in special cases. Choose a number that has not been used.

- **Garnishment status/Served garnishment**

  If you create a record, the system enter the default value **1** in the *Status* field. With this, the garnishment/cession is set to *active*. However, you can select other values. In the *Date* field, the system defaults to today's date. You can overwrite this date.

- **Creditor/Address**

  Enter the creditor's data that is relevant for the garnishment/cession. Record either the creditor's company/department or his or her name (with title).

If you choose *Maintain addresses*, you go to the view *Change Addresses Using Address Management: Overview*. To create a new address, choose *New Entries* and enter a text for the new address. Afterwards, choose *Address* and enter the relevant data.

Next screen: Additional administration data

If you choose *Additional Administration Data* you enter another screen. Here you make your entries. Enter data for the court order for garnishment. If there are other garnishments that have been served for a particular garnishment/session, you must enter the required data in the *Date of issue* field.

Next screen: Correspondence data

If you choose *Correspondence,* you go to another screen. Here you make your entries. Here you can enter additional data regarding the correspondence with the creditor.

Integration

If you **create or copy a record for this infotype** and then save, the system gives you a sequence of the most important infotypes for garnishment/cession. You process these one after the other. The validity date and the garnishment type and number are then transferred to *Garnishment/Cession A* infotype (0131). When it copies, the system also provides other default data.

You can only **delete the administration data** if no data is available in the other infotypes for garnishment/cession. If you want to delete a record for *Garnishment/Cession* infotype (0131), you must first delete the other infotypes for garnishment/cession.

SAP recommends that you delimit a garnishment at first by using *Environment* → *Delimit Garnishment*. If later claims come, you can then enter them at a later time. If you delete a garnishment, all data is lost.

Garn. Claim A Infotype (0132)

Definition

In this infotype, you determine the amounts of the garnishment/cession that must be repaid.

Creation of new records

Before you create new records for this infotype, ensure that *Garnishment/Cession* infotype (0131) has already been created for the corresponding garnishment. Both infotypes must have the same validity periods.

Afterwards, when you create a record for *Garn. Claims A* infotype (0132), the system gives you the interest fields for processing. These fields refer to the previous amount fields. If you select one of the interest fields and save, you go to the *Garn. Interest A* infotype (0133). Here, all fields contain entries – except the *Start date* and *Interest* rate fields. When you select two interest fields and save, the system gives you *Garn. Interest A* infotype (0133) twice for processing.

Creation of subsequent records or copying from records

When you create a subsequent record (this means that a record already exists) or you copy a record, the system assigns the *New entry* indicator. If you select the indicator, the system ignores the past garnishment results. Only the new amounts are for repayment. After you save, the system give you the *Garn. Compensation A* infotype (0137) for processing. Here all fields already contain entries.

Use

The data recorded in the infotype is used in payroll. Monthly amounts (for example, monthly costs, regular support payments, and so on) are used in each period in the complete amount for repayment. If you delimit the validity of the monthly amounts, these are factored. This means that they are reduced proportionately. However, with the other amounts, only the rest amounts are used for repayment.

Structure

Division into subtypes

The infotype is divided into different garnishment types. Each garnishment type represents a subtype of the infotype. The following subtypes have been set up in the standard:

- Subtype 1 Standard Garnishment
- Subtype 2 Preferred garnishment (support payments)
- Subtype 3 Garnishment/Cession
- Subtype 4 Pledge

You can set up more garnishment types in Customizing.

Garnishment type/number

The system gives you a default *garnishment number.* However, you can overwrite this number.

Garn. Interest A Infotype (0133)

Definition

In this infotype, you store the data on the interest to be repaid for a garnishment/cession. You can decide if you want to calculated interest on the costs or on the debt. Along with the usual interest specifications such as interest rate, type and so on, you can specify whether value-added tax is calculated on the interest.

Creation of new records

Before you create new records for this infotype, ensure that *Garnishment/Cession* infotype (0131) has already been created for the corresponding garnishment.

Use

The recorded data is used in payroll to calculate the repayment interest and in standard reporting.

Structure

Division into subtypes

The infotype is divided into different garnishment types. Each garnishment type represents a subtype of the infotype. The following garnishment types have been set up in the standard:

- Subtype 1 Standard garnishment
- Subtype 2 Preferred garnishment (support payments)
- Subtype 3 Garnishment/Cession
- Subtype 4 Pledge

You can set up more garnishment types in Customizing.

Garnishment type/number

The system gives you a default *Garnishment number.* However, you can overwrite this number.

Interest specifications

Here you record *interest type*, *interest calculation type*, *period of interest*, *interest rate*, *amount* and *value-added tax*.

Garnishment Amount A Infotype (0134)

Definition

In this infotype, you store the data required for the calculation of the attachable amount for a garnishment/cession. The data is used during payroll.

Creation of new records

Before you create new records for this infotype, ensure that *Garnishment/Cession* infotype (0131) has already been created for the corresponding garnishment.

Structure

Division into subtypes

The infotype is divided into different garnishment types. Each garnishment type represents a subtype of the infotype. The following subtypes have been set up in the standard:

- Subtype 2: Preferred garnishment (support payments)

  You can create a record of this infotype for a preferred garnishment. The system gives you a default *Garnishment number.* However, you can overwrite this number.

- Subtype A: All Garnishments

  Using subtype A, create a record. This record's entries are valid for all garnishments. The system always uses *Garnishment type* **A** and the *Garnishment number* **000**. You cannot overwrite the entries in the *Garnishment type* and *Garnishment number* fields.

  When you create the first garnishment, the system gives you the subtype A *All Garnishments* for processing. If you create other garnishments, the system gives you the subtype A for processing only if the validity period for *Garnishment/Cession* infotype (0131) is longer than the validity period of the existing period. While saving, the existing record for subtype A is generally extended and overwritten.

You can set up more garnishment types in Customizing.

Garn. Conditions A Infotype (0135)

Definition

You store the special conditions in this wage type. These conditions are then used for garnishing certain groups of wage types. These are referred to as garnishment groups. Based on these specifications, the attachable amount is calculated for each garnishment group in payroll.

Structure

Division into subtypes

In the standard system, the infotype has exactly one subtype:

Subtype A: *All Garnishments*

Initial screen: Special Condition *(Part 1)*

The *Garnishment type* field contains the value **A** and the *Garnishment number* field contains the value **000**. These fields are not ready for entries; therefore, the entries cannot be overwritten. The entries are valid (in case of subtype **A**) for all garnishments. This is independent of the sequence number that identifies a certain garnishment. Therefore, the *Sequence number* field is not ready for entries.

Next screen: *Special Condition (Part 2)*

If you choose *Special Cond. Part 2*, you go to a second screen. Here you can make more entries for the basic exempt amounts. In addition, you can enter a specific procedure for special cases.

You cannot save data in the present screen. You can only save data in the initial screen.

Garn. Transfer A Infotype (0136)

Definition

In this infotype, you store the data on the bank transfer for a garnishment/cession. Payroll requires this data in order to make transfers to the creditor. Standard reporting also uses this data.

In addition to the standard transfer specifications such as *bank key*, *account number*, and so on, you can enter the *priority* for each transfer. You can assign the transfers to individual, repaid amounts.

Example

You can specify that the part of the attachable amount that is on the repaid debt is transferred to account A and the part of the attachable amount that is on the repaid costs is transferred to account B.

The *Consecutive number* field allows you to create several transfer entries for a single garnishment/cession.

The system provides the *Recipient data* according to the entries in *Garnishment/Cession A* infotype (0131). You can overwrite the default values.

Creation of new records

Before you create new records for this infotype, ensure that *Garnishment/Cession* infotype (0131) has already been created for the corresponding garnishment.

Structure

The infotype is divided into different garnishment types. Each garnishment type represents a subtype of the infotype. The following subtypes have been set up in the standard:

- Subtype 1 Standard Garnishment
- Subtype 2 Preferred Garnishment (support payments)
- Subtype 3 Garnishment/Cession
- Subtype 4 Pledge

You can set up more garnishment types in Customizing.

Garn. Compensation A Infotype (0137)

Definition

In this infotype, you store the data on compensation for a garnishment/cession. The data is used during payroll.

For *Compensation*, enter the *Compensation type* and the *Reason* for the payment. In addition, enter the *Creation date* and the *Amount.* For some compensation payments, you can also enter a *wage type*.

In the case of paying out a credit, the system shows the credit that has been accrued.

Structure

Division into subtypes

The infotype is divided into different garnishment types. Each garnishment type represents a subtype of the infotype. The following subtypes have been set up in the standard:

- Subtype 1 Standard Garnishment
- Subtype 2 Preferred Garnishment (support payments)
- Subtype 3 Garnishment/Cession
- Subtype 4 Pledge
- Subtype D: External Loan
- Subtype V: Advance/Allowance

You can set up more garnishment types in Customizing.

Family Assistance

Family Allowance A (0043)

Definition

You use this infotype to record the data from the previous employer. This data is confirmed by the family allowance card (*FB Karte*). This way you can determine the validity of the data.

If you add a record to this infotype and you then enter a validity period, the system automatically gives you all children from *Family/Related Person* infotype (0021) who are registered for the time period and who are under 28.

To transfer these children to *Family Allowance A* infotype (0043), enter the following data:

- Number of family allowance card
- Family allowance entitlement
- Basic data for family allowance

If you choose *List of Children*, you reach a list screen that displays all children registered in Family/Related Person infotype (0021) [Seite 855].

You can enter new children in *Family Allowance A* infotype (0043) at any time, by entering the corresponding number of the child (object identification) from *Family/Related Person* infotype (0021) in the change mode. You can enter up to 20 children for entitlement to the family allowance.

If you enter data for entitled children, the system assumes that you have already entered the child's basic data in *Family/Related Person* infotype (0021). This data includes the following:

- Number of the child (object identification)
- First name and last name
- Place of birth and date of birth

If you delete a child from *Family/Related Person* infotype (0021) for which data is also saved in *Family Allowance A* infotype (0043), the system deletes this child's data from *Family Allowance A* infotype (0043) as well.

Fiscal Data

Fiscal Data A Infotype (0042)

Definition

In this infotype, you record the data for each employee that is relevant for the calculation of the employee's income tax. This data is used during payroll and for a number of evaluations and reports that follow the payroll run.

> To record tax data for an employee, you must have created a record for *Organizational Assignment* infotype (0001) for the employee.

You create the first record for *Fiscal Data A* infotype (0042) as part of the *Hiring* personnel action. Here you must ensure that the start date of this infotype record matches the date of the employee's first entry in your company. (In most cases, the first entry date corresponds to the start date of the record for *Organizational Assignment* infotype (0001).)

If you want to delimit a record of *Fiscal Data A* infotype (0042), the end date of the infotype record **must** be the last day of a month. This, however, is **not applicable** when you delimit the infotype in order to create a new record for **work abroad**.

If you delimit an employee's existing record for the infotype in order to create a new record for **work abroad**, you must carry out an organizational change at the same time. This means that at the end date of the record for *Fiscal Data A* infotype (0042), a record for *Organizational Assignment* infotype (0001) must exist for the employee. The start date of the new record of *Organizational Assignment* infotype (0001) must be the same as the start date of the *Fiscal Data A* infotype (0042).

You can also create *Fiscal Data A* infotype (0042) for a job abroad that is valid for less than a month.

> Using the report Creation of New Tax Records (RPILSKA0) [Extern], you can create new records for all employees for *Fiscal Data A* infotype (0042) at the beginning of each year.

Use

By entering the appropriate amounts, indicators, and so on, you provide the system with information as to which circumstances are to be taken into account when calculating taxes during payroll for the employee. The entries are especially important that are factor into the determination of the tax assessment base. These include tax exemptions and deductions.

Structure

- **Tax specifications**

  Here you enter the procedure for tax calculation and if the employee is not required to pay taxes, the reason for this exemption. In addition, you determine whether the a periodic tax declaration is carried out.

- **Tax exemptions and deductions/individual exemptions**

  Here you specify any tax exemptions or deductions that could possible be granted. See also: Tax Deductions [Extern]

- **Other pay deductions**

Here you specify whether the employee's income is used to determine the municipal tax and the contribution to the family-related expenses fund.

Integration

If you create new records for *Fiscal Data A* infotype (0042), the system provides default values for some fields. These values are based on the data stored in *Organizational Assignment* infotype (0001) and *Personal Data* infotype (0002).

When you save, the system checks your data against the data stored in following tables:

- *Tax Offices* (T5A2F)
- *Tax procedure* (T5A2T)
- *Texts for Tax Exemption* (T5A2C)
- *Tax Procedure / Reasons for Tax Exemption* (T5A2D)
- *Tax Deductions (*T5A2S)

Previous Employer A Infotype (0055)

Definition

You use this infotype to record the data that is from the previous employer. This data was confirmed in the payslip L 16.

Entering this data is not useful if the employee has entered your company **during** a calendar year (that is he or she did not start on 01/01). In this case, the data from a previous employer affects the processing of special payments as regards deductions.

Use

The system uses the data saved in *Previous Employer A* infotype (0055) for the current calendar year. The data from the previous employer are read during payroll for the employee. It is used to calculate employment taxes. The values are directly used to determine tax for regular and special payments and to determine the social insurance contributions.

Structure

- **Validity period**

  For each period confirmed by the previous employer, you must create a record for this infotype and enter the appropriate validity period.

- **Payments at previous employer**

  Here you record the confirmed amounts on the payslip form. The system supplies the wage types for which you can record the amounts. They include the following amounts:

  – Taxable wages

  – Applied exemptions

  – Retained employment tax

Integration

When you create a new record for *Previous Employer A* infotype (0055), the system provides you with wage types from the view *Permitted Wage Types* (V_T512Z) that you have determined in *Customizing*. You can neither delete these wage types nor add new wage types. If you have already specified a time period in the *Maintain Master Data* screen, the view V_T512Z is read with the start date of the infotype record. If you have not specified a date, the table is read with the system‘s date.

The characteristics of the default wage types are stored in the view *Wage Type Characteristics* (V_T511) under the country grouping *03*.

Commuter Rate A Infotype (0058)

Definition

You use this infotype to store data on the commuter rate that a particular employee has used.

The commuter rate is a part of the income-related costs and, thus, reduces the tax assessment base for income tax. The tax assessment base is calculated during payroll.

You must first record an employee's data in *Fiscal Data* infotype (0042) before you can record data in *Commuter Rate* infotype (0058). The system checks whether tax data exists for the employee in the specified period of time.

> ⚠ If you **create** a record for this infotype, the start date of the record must be the first of a given month.
>
> If you **delimit** a record for this infotype, the end date of the record must be the last day of a given month.

Structure

- **Flat-rate for commuters**

  By entering the appropriate indicator in the *Flat-rate for commuters* field, you determine the flat-rate that the system uses when calculating the tax assessment base.

- **Transportation costs**

  If the employees incurs costs for transportation to and from work, you must choose the appropriate *commuter flat-rate* and then enter his or her actual costs in the *Transportation costs* field.

- **Distance in whole KM/travel time/declaration**

  The data that you enter in these fields do not have any influence on payroll. They are merely informative. For the most part, the data matches the entries that the employ must fill in the form ("Declaration for Commuter Flat-Rate").

Integration

Commuter Flat-Rate A infotype (0058) is provided for processing as part of the *Hiring* personnel action.

In *Commuter Flat-Rate A* infotype, (0058) if you choose *Goto* → *Tax Data*, you reach the *Display Fiscal Data A* screen (infotype 0042). When you save the data, the system checks in the table *Tax Deductions (A)* (T5A2S), to ensure that your entry in the *Commuter flat-rate* field is admissible.

Social Insurance

Social Insurance A Infotype (0044)

Definition

In this infotype, you enter the payroll-relevant data for each employee. This data determines the contribution rates used to calculate the social insurance contributions for this employee.

In addition, you record data that the system requires for evaluations. These evaluations are carried out directly after the payroll run.

Use

For each time of the employee's job with the company, exactly one valid record of this infotype must exist. You cannot run payroll for personnel numbers that do not have a record for *Social Insurance A* infotype (0044).

The entered data is used in payroll, for the transfer of social insurance contributions, the creation of contribution statements and various evaluations.

Structure

- **Basic data**

  When you create a new record for this infotype, the system determines default values based on the feature *Default values for the SI screen (A)* (AUSVA). These default values are for the *SI group*, *SI institute*, and *Contribution group* fields.

  You find the step for editing features in Customizing for *Personnel Administration* under *Payroll Data → Social Insurance → Determine Standard Default Values*.

- **Indicator Contributions/Costs**

  Using your entries in the basic data, the system gives you the *indicator for contributions/costs* according to the values you set in Customizing.

  You find the step for determining features in Customizing for *Personnel Administration* under *Payroll Data → Social Insurance → Determine Default Values for Costs/Contributions*.

Integration

You usually create the first record for these infotypes during the *Hiring* personnel action (see Recording Insurance Data [Extern]).

Before you can record data in *Social Insurance A* infotype (0044), you must first record an employee's data in *Personal Data* infotype (0002).

The *Social Insurance A* infotype (0044) is closely connected to the SI Notification Supplements A infotype (0367) [Seite 924]. In the *SI Notification Supplements A* infotype (0367), you record the data that is required to make registrations, deregistrations, and change notifications for social insurance. If you change certain data in *Social Insurance A* infotype (0044), the system defaults to the

subtype for *SI Notification Supplements A* infotype (0367). You must process this infotype.

Example

You change the employee's *contribution group* in *Social Insurance A* infotype (0044). After you have saved this infotype record, the system defaults to *SI Notification Supplements* infotype (0367) subtype *06* (*Change SI-Relevant Data*). You then process this subtype. The system selected the *Contribution group change* field from the *Other reasons* field.

See also:

Creating Social Insurance Data for New Employees [Extern]

SI Notification Supplements A Infotype (0367)

Definition

In this infotype, you enter the data required to make a registration, deregistration, or change notification (except for workers on the night shift with heavy labor) with the regional health insurance fund (*GKK*).

The system defaults to the infotype during the personnel actions that were determined in Customizing. You then process this infotype.

Example

The employee's address has changed. You enter the changed data in *Addresses* infotype (0006). After you save, the system defaults top subtype *06* (*Change in SI-Relevant Data*) for *SI Notification Supplements A* infotype (0367). You then process the subtype.

You can call up the infotype directly for processing. To do this, choose the following path from the *SAP Easy Access* screen *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

Use

You can use the data that you record in this infotype to create data records and then transfer these to the *GKK* using Electronic Data Exchange (ELDA) [Extern]. To create data records for ELDA, choose *ELDA-Record* and *Save*.

You can also create test data records for the ELDA. The health insurance agency then checks them. To create test records, choose *Process* → *Test ELDA Record*.

The system writes the created (productive) data records and test data records to the table *Created Data Records* (T5A1O). To copy the data records stored here to a data medium, you use the report RPUELDA0. The test data records are indicated accordingly.

Structure

In order to identify the individual record types of the ELDA, the infotype is divided into different subtypes. Each subtype corresponds to exactly one ELDA record type. The following subtypes have been set up in the standard system:

Subtype	ELDA record type
03	Registration
04	Deregistration

05	Notification of temporary employees
06	Change in SI-relevant data
08	Corrected registration
09	Corrected deregistration
13	Reversal of registration
14	Reversal of deregistration
15	Reverse notification of temporary employees
16	Special payment notification
17	Reverse special payment notification

The *Transfer* status field is updated by the system. If you create a new record for this infotype, the transfer status is set to *new* (**1**). If you edit this record manually, the status of transfer is set to *edited* (**2**). After you have created a ELDA data record, the transfer status is set to *Data record ELDA created* (**3**).

If an infotype record has the transfer status **3**, you cannot send the notification again.

Integration

When creating the ELDA data records, the system also reads the relevant data from the following infotypes:

- Organizational Assignment (0001) [Seite 1271]
- Personal Data (0002) [Seite 1259]
- Addresses (0006) [Seite 1256]
- Planned Working Time (0007) [Seite 107]
- Social Insurance A (0044) [Seite 922]

The subtype 06 (*Change in SI-Relevant Data*) from *SI Notification Supplements A* infotype (0367) is automatically provided for processing if you make notification-relevant changes in master data:

- Change of name in *Personal Data* infotype (0002)
- Change of address in *Addresses* infotype (0006)
- Change in the contribution group in *Social Insurance A* infotype (0044)

If an employee leaves your company and you record a SI deregistration with this infotype for this employee, the system derives the leaving reason from *Actions* infotype (0000) and proposes it as a default value. First, however, you have set up the feature *Default value for deregistration reason IT0367* (AAGRD). Using this feature you can assign the corresponding deregistration reason to the events

and event reasons that lead to leaving. This deregistration reason is used for the SI deregistration.

See also:

Recording Insurance Data [Extern]

Creating ELDA-Data Records for Registration, Deregistration and Change Notification [Extern]

Work and Remuneration Confirmation A Infotype (0526)

Definition

You use this infotype to record the data required to create a work and remuneration confirmation for sick pay and maternity pay [Extern] or to reverse a confirmation that has already been created.

When you create a record for this infotype, the system uses the date that you stored in the *Last workday* field of the *Work and Remuneration Confirmation* screen as the start and end date of this record.

Default Values for the Infotype

When you create a record for this infotype, you can let the system provide you with default values for individual fields. To do this, enter a date in the *Time period* field in the *Maintain HR Master Data* screen. If you then choose *Create,* the system reads the employee's personal calendar [Extern] for absences [Extern] that occur after the specified date. These absences must be a valid reason for creating a work and remuneration confirmation for the employees. At the same time the system determines in view V_T5A4Q (*Characteristics of Attendance/Absence Types)* how the individual absences are valuated.

Example

The employee Hans Hofer's personal calendar contains the following absence symbols:

KR KR KR KR K4 K4 K4 K4

As long as the absence symbol *KR* (Illness) is recorded, you do not need to create a work and remuneration confirmation. However, if the calendar contains the absence symbol *K4* (*Illness, quarterly earnings*), in some cases, a work and remuneration confirmation must be created for the employee.

The following are prerequisites for getting useful default values:

- The personal calendar for the employee in question must be up-to-date (this means that the report Generate Personal Calendar [Extern] (RPTGENA0) has been run previously.
- The data for *Continued Payments* has been recorded in the view *Characteristics of Attendance/Absence Types* (V_T5A4Q).

Use

You can use the data that you record in this infotype to create data records and then transfer these to the regional health insurance fund [GKK] using Electronic Data Exchange (ELDA) [Extern]. To create data records for ELDA, choose *ELDA-Record* and *Save*.

You can also create test data records for the ELDA. The health insurance agency then checks them. To create test records, choose *Process* → *Test ELDA Record*.

The system writes the created (productive) data records and test data records to the table *Created Data Records* (T5A1O). To copy the data records stored here to a data medium, you use the report RPUELDA0. The test data records are indicated accordingly.

Structure

In order to identify the individual record types of the ELDA, the infotype is divided into different subtypes. Each subtype corresponds to exactly one ELDA record type. The following subtypes have been set up in the standard:

Subtype	ELDA record type
70	Work and remuneration confirmation – sick pay compensation
71	Reverse work and remuneration confirmation – sick pay compensation
75	Work and remuneration confirmation – maternity pay
76	Reverse work and remuneration confirmation – maternity pay

Transfer status

The *transfer status* field is automatically updated by the system. If you create a new record for this infotype, the transfer status is set to *new* (**1**). If you edit this record manually, the status of transfer is set to *edited* (**2**). After you have created a ELDA data record, the transfer status is set to *Data record ELDA created* (**3**).

If an infotype record has the transfer status **3**, you cannot send the notification again.

Employee/Employer

When you save a record for this infotype, the system automatically saves the additional data on the employee and the employer in the background. The data is stored together with the infotype record. This way, you can reverse all data sent in the notification at the same time in case of a reversal of a work and remuneration confirmation.

The system saves the following personal data under *employee*:

- Personal data (social insurance number and so on)
- Bank details
- Address

The system saves the following employer data under *employer:*

- Account number
- Name
- Telephone number

If you want to update the employee or the employer data, display the data and choose *Refresh Data*.

See also:

Issuing a Work and Remuneration Confirmation [Extern]

Reversing a Work and Remuneration Confirmation [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Payments on Leaving

Payments upon Leaving A Infotype (0527)

Definition

If an employee leaves your company (see also Employee's Leaving [Extern]), you can record the data for the following leaving-related payments:

- Severance pays
- Leave compensation/factored leave compensation (see also Leave Compensation/Factored Leave Compensation [Extern])
- Penalty (see also Penalty System [Extern])
- Rationalization Payments

The system automatically uses the data saved in this infotype for the employee's last payroll run.

You make the required Customizing settings for recording leaving-related payments in Customizing for *Personnel Administration* under *Payroll Data* in the section *Leaving-Related Payments*.

To record data in *Payments upon Leaving A* infotype (0527), perform the *Leaving* personnel action for the employee. When you perform this action, this infotype comes up automatically for processing. For instructions on performing the *Leaving* personnel action, see Performing Leaving Personnel Action Type for an Employee [Extern]. After you have performed the action, the system stores the **`Left company`** status in the *Employment* field of *Actions* infotype (0000).

To record data in this infotype for an employee whose status has changed from an active to an inactive work relationship [Extern], the **`Inactive`** status must be stored in the *Employment* field of *Actions* infotype (0000). For pensioners, the **`Pensioner`** status must be stored in the *Employment* field. For pensioners, also ensure that during obligatory insurance coverage the employee's former contribution group is retained and that the SI-exempt payments are made during this time period.

In *Payments upon Leaving A* infotype (0527) you can only record data for employees with the **`Left company`**, **`Inactive`**, or **`Pensioner`** status in the *Employment* field of *Actions* infotype (0000).

Start and end date of the infotype

The fields for the infotype's start and end date are not ready for input. The system maintains the fields based on the employee's leaving date and the entry contained in the *Employment status* field of *Actions* infotype (0000):

- **Leaving during the month**

  If the employee leaves the company during the month, the system reacts as follows:

  - The start date of the infotype is set to the last day on which the employee has the **`Active`** employment status
  - The end date of the infotype is set to the last day on which the employee has the **`Left company`**, **`Inactive`**, **`or Pensioner`** *employment status*

- **Leaving at the end of the month**

If the employee leaves the company at the end of the month, the system sets the start date and end date of the infotype to the last day on which the employee had the **`Active`** status.

Create a record for the infotype

If you create a record for the infotype, the system gives you the default values that your system administration stored in Customizing for *Personnel Administration* under *Payroll Data* → *Leaving-Related Payments* → *Determine Default Values for Infotype*.

After when you have entered data for a leaving-related payment, this payment's tab page then includes the icon. If you save the data and call up the record again later, the icon shows you the payments for which data is saved to the database (for example, severance pays).

If you have inadvertently overwritten the default values that were displayed when creating a record and would like to retrieve them, you must double click on one of the following fields:

- *Severance pays?*
- *LC/FLC? (leave compensation/factored leave compensation)*
- *Penalty?*

Change a record for the infotype

When you change a record for the infotype, the icon shows you the individual tab cards of the payments for which data has been saved to the database: If this symbol appears, data for the payment has been written to the database.

If you have inadvertently overwritten the default values that were displayed when creating a record and would like to retrieve them from the database, you must double click on one of the following fields:

- *Severance pays?*
- *LC/FLC? (leave compensation/factored leave compensation)*
- *Penalty?*

If you **create** a record for this infotype, the system gives you the default values that the system administration has saved in Customizing. If you **change** a record, you get the values that are saved in the database.

Copy a record for the infotype

If you want to copy a record for this infotype, the employee must have the **`Left company`**, **`Inactive`**, or **`Pensioner`** status in the *Employment* field of *Actions* infotype (0000).

The system determines the new start and end date of an infotype record while copying the record.

Example

In the *Leaving* personnel action, you have entered the wrong leaving date for an employee. To correct the date, copy the existing record for *Payments upon Leaving A* infotype (0527) and change the date in the personnel action.

After you have copied the record, you must delete the previous record manually. The system does not delete the previous record automatically.

Delete a record for the infotype

If you want to delete a record for the infotype and if the record contains specifications for leave compensation or factored leave compensation, you must check the *Payroll to* field in *Payroll Status* infotype (0003) after you have deleted the record:

If the system has set the a later date due to an extension of the obligatory insurance (on the basis of leave compensation or factored leave compensation) (see Dependence on Payroll Status Infotype (0003) [Extern]), the system cannot automatically reset the original date. Therefore, you must check to ensure that the date is still correct and, if required, reset the date manually to the original date.

See also:

Dependence on Payroll Status Infotype (0003) [Extern]

Taxation of Leaving-Related Payments [Extern]

Wage Types [Extern]

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Switzerland

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Residence Status Infotype (0048)

Definition

In the *Residence Status* infotype (0048) you store the specifications on the status of the foreign employee's residence permit.

Structure

General Specifications

You enter the type of official residence permit issued by the office for non-nationals in the *Residence status* field.

In the *Issued on and Issued by* fields, you store the date the permit was issued and the name of the administration that issued it. The address can be used for correspondence. The data in the *Permit number* and *Expiration date* fields are used to request a renewal or an extension of the residence permit from the office for non-nationals.

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

25. For which the payroll is to be run
26. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Additional Organizational Assignment Infotype (0039)

Definition

In *Additional Organizational Assignment CH* infotype (0039), you store the entries for the following employee assignments:

- Paying office
- Profession/job category
- Time targets
- Department for reduced working hours

Structure

Paying office

In the *Paying office* field, you can specify three different assignments for each employee. If payroll is divided up within the company, you can sort according to these paying offices.

Entries for ASM statistics

The *per Employee* field is used in the standard system for the Employers‘ Association for Swiss Engineering Industry (*ASM*) statistics in August.

If your company does not belong to the *ASM*, you can use the field for your own statistics.

Time targets

The *Minimum %* and *Maximum %* fields can be used to control the piecework rate.

These fields are not used in the standard system.

Reduced Working Hours

You assign your employees to the organizational units for reduced working hours based on the company area.

Vertragliche und betriebliche Maßnahmen

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Company Allowance

Company Pension Fund Infotype 0046

Definition

In *Company Pension Fund* infotype 0046, you store the specifications from the pension insurance.

Structure

General Specifications

In the *Pension fund* and the *Insurance type* fields, you assign the employee to a certain insurance. The system uses these specifications to calculate the corresponding pension contributions during payroll.

In the *Insurance number* field, you enter the employee's number with the pension fund.

In the *Entry date* field you store the date of the employee's membership start in the pension fund.

Data for Premium

In the *Premium base* field you can enter an amount that is used independent of wage and without a coordination deduction for deducting the premium.

In the *Coordination correction* field, you enter the amount by which the coordination deduction is to be corrected.

If you have agreed on a fixed amount for premium, you must enter the *EE premium* and the *ER premium* fields. Both fields must contain entries. Thus, no premiums are calculated during payroll.

Dates for Pension

If another date is used to calculate the premium or the pension (for example, due to insurance years that the employee has bought), enter it in the *Technical entry* field.

If the start date for the calculation of termination benefits differs from the technical entry date, the start date can be entered in the *Start date for termination benefits* field.

If the normal pension start date from table *T5C1C (Pension Funds)* is not valid, you must enter the differing date in the *Pension start* field. Thus, the pension starts with the first of the month after the birthday that is specified as the retirement age in the table.

In the *Insurance amount* field, an insurance amount is recorded. It is independent of the premium calculation.

If the wages covered by the insurance are not to be increased, enter an X in the *Increase freeze* field. This field is not evaluated in the standard system.

The *Pension rate correction* field shows the amount by which the pension rate from the table *T5C1J (Pension Rates)* is to be modified.

If an employee is only partially able to work due to invalidity, enter the annual wages before invalidity in the *Inv. annual wages* field. You enter the degree of invalidity in the *Inval. percentage* field.

Company Pension CH Infotype 0120

Definition

In *Company Pension CH* infotype 0120, you enter all postings to pension fund accounts that are not automatically created by a calculation program. These include:

- Wages
- Age-related credit
- Interest

Structure

In the *Fund* field, you assign the transaction to a certain pension fund and, thus, to the employee's account. You use *Transaction type* to indicate the desired transaction.

The *transaction type* creates the subtype for *Company Pension Fund* infotype 0120.

Transactions for company pension fund

You can update the *Amount* and *Number/Unit* as dependent on the transaction type. The system checks the combination you entered.

Depending on the country setting, the system defaults to a currency. However, you can override this currency.

The system proposes the last day of the current payroll period for the *Creation date*. You can enter a different payroll period in the *Default date* field. The system then proposes a different date.

In the assignment number, you enter a reference to the original document. This field is not used in the standard system. The field is at your disposal.

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Fiscal Data

Fiscal Data CH infotype (0038)

Definition

In this infotype, you record all data that is relevant for the calculation of deductions for payment of taxes. The system uses the data you recorded for the following:

- Calculation of the withholding tax and the resulting deduction in payroll
- Creation of the wage statement and the withholding tax statement
- Withholding tax accounting with the cantonal tax offices

To run payroll, this infotype must be maintained. If no fiscal data is available for an employee, the system cancels the payroll run for the corresponding personnel number.

Structure

When you call up the infotype's maintenance transaction, the system displays the following fields:

Group box for *General Specifications*

In the *Tax liability* field, assign the appropriate category to the employee. For minors who hold the permit of residence with the C class, the system automatically does not calculate taxes until the minimum age limit has been reached for the withholding tax obligation.

In the *Canton* and *Municipality* fields you enter the employee's tax canton or tax municipality.

You must specify the canton of residence for the following reasons:

- The withholding tax rate depends on the canton
- Withholding tax accounting is with cantons (and, in some cases, with municipalities)

SAP recommends that you specify the canton of residence; this enables the system to select and sort the wage statements by canton.

Group box for *wage statement*

If you do not make entries in these fields, the system evaluates the data in the LAW (wage statement) payroll unit to which the employee is assigned. However, it does not evaluate the *Costs reimbursement* field.

If you make an entry in one of the fields, you override the default value of the payroll unit. The entries you have overridden are printed on the employee's wage statement.

Group box for *withholding tax entries*

Usually, you store the valid withholding tax rate for an employee liable for withholding tax. The system uses this rate along with the cantonal rules to calculate withholding tax automatically.

Alternatively, you can enter a percentage or an amount. If you run payroll for only a few employees who live in a certain canton, this procedure is particularly useful.

If the employee's tax class changes (for example, due to marriage), you can only change the taxation rate at the beginning of the next month.

Insurance

Social Insurance CH Infotype (0036)

Definition

In this infotype, you record the employee's master data for the calculation of social insurance contributions. The data is processed during the payroll run and during the creation of evaluations.

Structure

The infotype is divided into the following group boxes:

- AHV/UI
- Accident insurance
- Family-Related Bonuses
- Per diem sickness indemnity
- Voluntary insurance

In each group box, pushbuttons are located on the right side. You can use these to call up more information on the payroll units [Extern] for social insurance.

The group boxes contain the following individual fields:

Group box AHV/UI

The *AHV obligation* controls the employee's obligation for the Swiss social insurance dependent on his or her type of employment. The system supplies the default value `1` (normal liability). The contributions to be deducted are calculated according to the employee's age.

If you have the employee's AHV number, store it in the *AHV-No.* field. Dependent on the payroll unit AHV/ALV, you can control whether the first eight places of the AHV number serve as default values in accordance with the official table. Generally, the check is carried out according to the official regulations. You can switch off the check by entering `000` as the last three numbers.

The *Percentage SI obligation* and *Unemployment insurance fund* fields are hidden in the standard system.

When the *Percentage SI-obligation* field is activated in the system, entries are only made for those employees who are subject to the SI obligation. When the *Unemployment insurance fund* field is activated, you can enter the unemployment fund with which you settle. From now on, the payroll unit controls this entry. For reasons of downward compatibility, the field is still available, but is no longer used in the standard system.

Group box for accident insurance

In the *Internal company area* field, you enter the company area to which the employee is assigned. This company area serves as a reference for risk classes in the accident insurance.

In the *UVG/SUVA liability* field, you determine the employee's obligation for industrial accident insurance. The system uses this entry to calculate the premiums for the obligatory accident insurance and for the division of the premiums between employee and employer.

The *NIA supplemental* insurance field is used to control the voluntary insurance under the SUVA maximum with which payments over 80% of the insured wage can be covered. The entry you make controls the premium calculation and the division of the amount into employer and employee shares.

Group box for family-related bonuses

You only make entries in the *Cantonal family equalization fund* and the *Company rule* fields if a special cantonal regulation or company rule differs from the specifications stored in the payroll unit. Use the pushbutton for the specification as to which rules are used for calculation of the family-related bonuses as regards the payroll units.

Group box for per diem sickness indemnity/voluntary insurance

Both group boxes are hidden in the standard system. If these group boxes are activated, you can specify a rule for calculating per diem sickness indemnity or contribution rates for the voluntary insurances different from the rule specified by the payroll unit. This is done for individual employees. To view the calculation rules used, press the information pressbutton for the appropriate insurance.

If you want to change the employee data in *Social Insurance CH* infotype (0036), you can can only make the change valid as of the first of the following month. Changes can never take effect during the month.

See also:

Creating Social Insurance Data [Extern]

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Singapore

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

27. For which the payroll is to be run
28. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Company Loans (Infotype 0045)

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Spain

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

29. For which the payroll is to be run
30. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

Appraisals (Infotype 0025)

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

South Africa

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

Family/Related Person (Infotype 0021)

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  - In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  - In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

Actions (Infotype 0000)

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

31. For which the payroll is to be run
32. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Fiscal Data

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

USA

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

33. For which the payroll is to be run
34. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management → Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

Communication (Infotype 0105)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

Appraisals (Infotype 0025)

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Special Benefits Administration

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Other Countries

Personal Data

Addresses (Infotype 0006)

In the *Addresses* infotype (0006), you store the address data of an employee/applicant. The employee's address is often used in conjunction with the employee's/applicant's name, taken from the infotype *Personal Data* (0002), for employee lists of different kinds, for forms, or for address labels.

The standard system contains the following address types:

- Subtype 1: *Permanent residence*
- Subtype 2: *Temporary residence*
- Subtype 3: *Home address*
- Subtype 4: *Emergency address*
- Subtype 5: *Mailing address*
- Subtype 6: *Nursing address*

Foreign Addresses

There are many different entry screens for the individual country versions for the infotype *Addresses* (0006). When you create an address, the system will choose the country screen that corresponds to the country of the personnel area to which the employee/applicant is assigned in the *Organizational Assignment* infotype (0001).

If you want to choose a country screen to enter an address for your employee/applicant other than the country screen suggested by the system, then do this by using the *Foreign Address* function. You will find this function on the entry screen of infotype *Addresses* (0006) when you are creating an address.

Country-Specific Features

- **Mexico:** Addresses (Infotype 0006): Country Specific Features Mexico [Extern]

Bank Details (Infotype 0009)

In the *Bank Details* infotype (0009), you enter the payee for the net pay or the travel expenses from the payroll and the bank details. When you create a new data record, the employee's/applicant's *name* will be taken from the *Personal Data* infotype (0002) for the payee's name. The *postal code* and/or the *city* will be taken from the *Addresses* infotype (0006). However, the payee and the employee/applicant do not have to be identical.

The standard system contains the following bank detail types:

- Subtype 0: *Main bank*
- Subtype 1: *Other bank details*
- Subtype 2: *Travel expenses*

When you enter the other bank details or the travel expenses, the fields *Standard value* and *Standard percentage* also appear. You must enter either an amount or a percentage for the other bank details.

There are two further bank detail types for countries that have implemented off-cycle-activities:

- Subtype 5: *Main bank details for off-cycle*
- Subtype 6: *Secondary bank details for off-cycle*

The data records belonging to the *Bank Details* infotype (0009) are evaluated in *Payroll* using the *Processing Request for Bank Details* function (P0009).

For additional information, refer to the documentation provided on function P0009.

Country-Specific Features

- **Argentina:** Bank Details (infotype 0009): National Features Argentina [Extern]
- **South Africa:** Bank Details (infotype 0009): Country Specific Features SA [Extern]
- **Venezuela:** Bank Details Infotype (0009): Country Specific Features: Venezuela [Extern]

Challenge (infotype 0004)

The data contained in the infotype *Challenge* (0004) is used in order to be able to fulfill the legal obligations with regards to the contributions for severely challenged persons.

Challenge Data

If the history for the infotype *Challenge* (0004) is to agree with the history contained on the ID card for severely challenged persons, then we recommend that you delimit the infotype in accordance with the data on the ID card.

The date in the field *ID end date* is used to create the severely challenged directory . The infotype record end date is used to display a list of severely challenged persons who receive payments.

In order for the system to accept the entry of additional vacation for severely challenged persons', a challenged level of at least 50% must exist in the *Challenge* (0004) infotype.

If a person loses his/her severely challenged status, it is legally possible to include this person in the list for severely challenged persons three months after the ID has expired.

To do this, delimit the infotype record using a date that is three months after the ID card's expiration date.

Issuing Authority

This set of data contains information on the authorities that issue the challenge certificates.

Second Issuing Authority

If a second issuing authority has also issued a challenge certificate for the person concerned, then you can also store details on the second issuing authority in this infotype. Make entries in the same fields for this issuing authority as for the first issuing authority.

Personal Data (Infotype 0002)

The *Personal Data* (0002) infotype stores data for identifying an employee/applicant.

The *Personal Data (0002)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

The validity start for the first record of the infotype *Personal Data* (0002) is determined from the employee's/applicant's date of birth.

Marital Status/Religion

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family/Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

Country-Specific Features

- **Argentina:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **Great Britain:** Personal Data (Infotype 0002): National Features Great Britain [Extern]
- **Ireland:** Personal Data (Infotype 0002): National Features Ireland [Extern]
- **Mexico:** Infotipo Datos personales (0002): Características nacionales Argentina [Extern]
- **South Africa:** Personal Data (Infotype 0002): National Features ZA [Extern]

Family/Related Person (Infotype 0021)

You store the employee's family members as well as other related persons In the *Family/Related Person* infotype (0021).

The standard system contains the following relation types:

- Subtype 1: *Spouse*
- Subtype 2: *Child*
- Subtype 3: *Legal guardian*
- Subtype 4: *Testator*
- Subtype 5: *Guardian*
- Subtype 6: *Step child*
- Subtype 7: *Emergency contact*
- Subtype 8: *Related persons*
- Subtype 10: *Divorced spouse*

Personal data

Using the employee data, the system defaults entries for the following fields:

- *Last name*
- *Gender*
- *Name prefix* (if necessary)
- *Nationalities*

You can change these default values as required.

Because the individual family members do not have to be recorded in the system, a check is not run to see whether the number of children entered in the infotype *Family / Related Person* (0021) corresponds with the number of children entered in the field *No.children* in the infotype *Personal Data* (0002).

National Features

- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Brazil:** Infotype 0397: Family/Related Person (Brazil) [Extern]
- **Japan:** Family/Related Person (Infotype 0021): Country Specific Features Japan [Extern]
- **Argentina:** Family/Related Person (Infotype 0021): Country Specific Features Argentina [Extern]
- **Austria:** Family/Related Person Infotype (0021) (Austria) [Seite 855]
- **Switzerland:** Family/Related Person Infotype (0021) (Switzerland) [Extern]

- **Spain:** Infotipo 'Familia/personas de referencia' (0021) (España) [Extern]

Internal Medical Service (Infotype 0028)

You can store the results and data referring to an employee's medical examination in the *Internal Medical Service* infotype (0028).

Subtypes are used to differentiate between internal medical services. The standard system contains the following examination types:

- Subtype 0001: *General data*
- Subtype 0002: *Habits*
- Subtype 0003: *Dermatological exam*
- Subtype 0004: *Reproductive organs and urinalysis*
- Subtype 0005: *Endocrinological exam*
- Subtype 0006: *Digestive tract*
- Subtype 0007: *Mobility*
- Subtype 0008: *Blood circulation*
- Subtype 0009: *Respiratory system*
- Subtype 0010: *Hearing examination - noise*
- Subtype 0011: *Hearing test*
- Subtype 0012: *Nervous system*
- Subtype 0013: *Vision*
- Subtype 0014: *Systematic illnesses*
- Subtype 0020: *Consultation hours*
- Subtype 0030: *Occupational accidents and illnesses*
- Subtype 0031: *Occupational accidents and illnesses*
- Subtype 0040: *Accidents and illnesses*
- Subtype 0050: *Absences*
- Subtype 0100: *Legal considerations*

Examination Data

When you edit a data record in the *Internal Medical Service* infotype (0028), the system proposes several *Examination areas* for each examination type.

Enter the results of the individual findings for the appropriate examination area in the field *Value* for the *Examination area* that you wanted to evaluate.

You can only enter numeric values in the field *Value.*

Actions

Actions (Infotype 0000)

Personnel actions simplify the administration of complex personnel procedures, such as hiring a new employee.

You can use personnel actions to:

- hire an employee
- change the organizational assignment of an employee
- change an employee's pay
- set an employee's status to early retiree or pensioner
- document when an employee leaves or re-enters the enterprise

Personnel Action

Personnel actions combine several logically related infotypes into one infotype group. Possible personnel action types include the following:

- *Hiring* an employee
- *Organizational reassignment*
- An employee *Leaving* the enterprise

With the infotype *Actions* (0000), you can request an overview of all the important changes related to an employee, and you can thus document the stages that an employee passes through in your company.

For more information on personnel actions, refer to the *Personnel Administration* documentation under *Personnel Actions*.

Status

Most actions create a record in the infotype of the same name *Actions* (0000). The deciding criteria as to whether a personnel action type should be stored in the infotype *Actions* (0000) is its effect on the status indicators.

In Customizing for *Personnel Administration*, you can assign the following three status indicators with different features to each personnel action type:

- Customer-specific (Status 1)

  Status 1 is customer-specific and is not used in the standard system.

- Employment (status 2)

  Status 2 relates to the employee's employment relationship. Status 2 is used in PA in the following two central places:

  – In Reporting

    Status 2 is used to indicate entries into and exits from the company. This affects data selection within reporting. Employees who have left the company are, for example, identified by status 2.

  – In time-constraint validation

Data records with time constraint 1 may be deleted at the end if the characteristic value of status 2 is 0, i.e. if the employee has left the company. The following infotypes constitute exceptions:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)

For these infotypes, a data record must exist at all times in the system for each employee from the point at which he or she is hired.

For more information on time constraint, see the *Time Constraint* in *HR Master Data* section in the *Personnel Administration* documentation.

- Special payment (status 3)

  Status 3 controls the employee's entitlement to special payment for automatic special payments within *Payroll Accounting*.

Personnel action types that change the status of an employee, for example, the *Leaving* personnel action type, are stored in infotype *Actions* (0000) . When you execute one of these personnel actions, the maintenance status ensues automatically.

Note that only one personnel action type per day is stored in the infotype *Actions* (0000). If you want to know how to perform and log more than one personnel action type for one employee on the same day, see the documentation for infotype *Additional Actions* (0302).

Organizational Assignment

You can store information on the following in infotype *Actions* (0000):

- *position*
- *personnel area*
- employee group
- *employee subgroup*

Additional Actions

Infotype 0302 *Additional Actions* allows you to automatically log **all** of the personnel action types that are performed for an employee on a specific date. It allows you to perform and document several personnel action types for an employee in the R/3 System on the same day.

You can display and edit the data records logged in the infotype *Additional Actions* (0302) on the list screen of the infotype *Actions* (0000),

In Customizing for *Personnel Administration*, choose menu path *Setting Up Procedures* → *Actions* → *Set up personnel action types* to specify, among other things, the following:

- whether you want to use the automatic logging of personnel action types in the infotype *Additional Actions* (0302)
- which personnel action type should be saved, that is preserved, in the infotype *Actions* (0000) if you perform another personnel action type for the employee on the same day

The *Actions (0000)* infotype has **time constraint 1**, which means that a valid infotype record must be available at all times.

Organizational Data

Cost Distribution (Infotype 0027)

In the infotype *Cost Distribution* (0027), you can determine how costs for an employee are to be distributed to different account assignment objects. For more information, see the following section in the *PY-Payroll* documentation:

Cross-Company Code Transactions [Extern]

Posting Information from Master and Time Data [Extern]

Subtypes are used to differentiate between costs that should be distributed. The standard system contains the following costs as subtypes:

- Subtype 01: *Wage/Salary*
- Subtype 02: *Travel expenses*

Cost Distribution

By entering a value in the field *Distr.,* you determine the costs to which the cost distribution is referring.

You determine the cost distribution with entries in the following fields:

If the total sum of distributed costs is less than 100%, the master cost center of the employee is debited for the outstanding amount.

- *CoCd* (Company code)
- *Cost center* (Cost center)
- *Order*
- *PSP element*
- *Perc.* (Percentage rate)

Note the following special features:

- If *Personnel Administration* is integrated with *Funds Management* (FI-FM), the *Funds* and *Funds center* fields are displayed.

  For more information on integration with *Funds Management*, refer to the IMG for *Financial Accounting* under *Funds Management* → *Actual and Commitment Update/Integration* → *Integration* → *Integration with HR (Human Resources)*.

- If the employee is employed in the public sector (Germany), the *Service type* and *Service category* fields are also displayed.
- The cost assignment is displayed on the list screen - this is the cost assignment that has been entered on the first line of the single screen.

  When you create a *Cost Distribution* (0027) infotype record, you must first ensure that company codes, controlling areas, and cost centers have already been set up.

Organizational Assignment (infotype 0001)

The *Organizational Assignment* (0001) infotype deals with the incorporation of the employee into the organizational structure and the personnel structure.

This data is very important for the authorization and control of *Payroll*.

Enterprise structure

You cannot enter data in the following fields: *CoCode* (company code), *PersArea* (personnel area) and *CostCent* (cost center). If you want to edit these fields, you must run a personnel action.

The value for the *Leg.person* (Legal person) field is determined automatically by the system and cannot be overwritten.

Personnel structure

The system derives the values for the *EE group* (Employee group) and *EE subgroup (*Employee subgroup*)* fields from the *Actions* (0000) infotype. These values cannot be overwritten. You can only assign these values by carrying out a personnel action.

You can overwrite the default values in the *Payr.area* field.

The *Organizational Assignment (0001)* infotype has the **time constraint 1**, which means that an infotype data record must exist in the system at all times as of the date on which the employee is hired.

Country-Specific Features

- **Argentina:** Infotipo Asignación organizacional (0001): Características nacionales Argentina [Extern]

Reference Personnel Number (Infotype 0031)

The *Reference Personnel Number* (0031) infotype is used to assign several personnel numbers to one employee, if the employee has different employment relationships in your company. In this case, the personnel number associated with the employee is known as a *reference personnel number*. This infotype establishes links between all of an employee's reference personnel numbers.

The *Reference Personnel Number* infotype (0031) is used in *Personnel Administration* for copying information that is common to all personnel number records for an employee who has several work contracts; it is also used by *Payroll*.

If an employee has more than one employment relationship within your company and these employment statuses are all accounted together, you must specify the order of priority for payroll in the *Reference Personnel Number Priority* infotype (0121).

Reference Personnel Number

In the *Reference Personnel Number* infotype (0031), a list of the interrelated reference personnel numbers is stored for each reference personnel number involved.

You can enter a reference personnel number in the *Actions* infotype (0000) when a new employee is hired. The system will automatically update the *Reference Personnel Number* infotype (0031) and copy certain reference personnel number infotypes.

Certain infotypes are the same for all the personnel numbers belonging to one employee: These are:

- *Personal Data* (0002)
- *Bank Details* (0009)

If you edit these infotypes for a personnel number, the relevant infotype records for all related personnel numbers are also pulled up.

Other infotypes that define the employee's individual working relationship can undergo different changes for the various different personnel numbers.

- *Organizational Assignment* (0001)
- *Basic Pay* (0008)
- Country-specific infotypes for tax and social insurance

When you edit these infotypes for a personnel number the system does **not** call up the relevant infotype records for all related personnel numbers.

As a rule, you only need to maintain the *Reference Personnel Number* (0031) infotype if you want to retrospectively create a relationship between two personnel numbers that already exist, or if you want delete a link between two personnel numbers.

If you include a personnel number, all the infotypes belonging to that personnel number that can be copied, will be taken on by the current personnel number.

Reference Personnel Number Priority (Infotype 0121)

If an employee has more than one employment relationship within the enterprise, this employee will have a personnel number for each one. In this case, the personnel number associated with the employee is known as a *reference personnel number*. The *Reference Personnel Number* (0031) infotype establishes links between all of an employee's reference personnel numbers.

By using the infotype *Reference Personnel Number Priority* (0121) you can determine the sequence in which an employee's reference personnel numbers are sent to payroll. The reference personnel number with the highest priority will be sent to payroll first.

You can also choose a *main personnel number* from the many reference personnel numbers that have been entered in the infotype *Reference Personnel Number Priority* (0121). This can be useful, if:

1. Only certain payroll steps are to be carried out for a *Reference personnel number* during payroll, or
2. You only want one of the *Reference personnel numbers* to be considered by the report programs.

If a payroll is run for an employee who has more than one personnel number in an enterprise, it is called a multiple payroll. A multiple payroll cannot be started by the payroll driver. If an employee who has a multiple payroll enters a payroll area, then the payroll run for that entire payroll area has to be started using the report *Scheduler* (RPCALC*M).

The maintenance of infotype *Reference Personnel Number* (0031) is a prerequisite for the maintenance of infotype *Reference Personnel Number Priority* (0121).

Restrictions

The *Reference Personnel Number Priority* (0121) infotype has the following restrictions:

- all the personnel numbers that have been entered in infotype 0121 must be the employee's *Reference personnel numbers.*
- if a main personnel number has been chosen, this personnel number must also be one of the *Reference personnel numbers* that has been entered in the current infotype record.
- all *Reference personnel numbers* must be in the same payroll area.
- you can only enter a begin date for a record. This date is the first date of a payroll period.
- an infotype record for the infotypes *Actions* (0000) and *Organizational Assignment* (0001) must exist for at least one day during the validity period for a *reference personnel number* to be listed in the current priority.
- all the *reference personnel numbers* that are in the current priority must belong to the same legal person.
- The relative sequence of the *reference personnel numbers* in the priority cannot not be changed.

An employee has the reference personnel numbers P1, P2, P3, P4 and P5. The following records for the infotype *Reference Personnel Number Priority* (0121) have been created one after the other for the employee. (The priority of the *reference personnel numbers* in their entry sequence):

- Record A: <P1,P2,P3>
- Record B: <P4,P2>
- Record C: <P2,P5>

The following new records cannot be created:

- Record 1: <P3,P1>

  This record directly contradicts the priority assigned in record A (in record A, P1 is before P3).
- Record 2: <P3,P4>

  This record contradicts the combination in records A and B.
- Record 3: <P4,P5>

  This record contradicts the combination in records B and C.

All the above restrictions are checked when you maintain the infotype.

Current Priority

The left column contains the priority entered in the current record. Each line is identified with a number that is created by the priority. The numbers reflect the payroll sequence.

Previous Priority

The middle column contains the priority entered in the previous record. This column is only displayed if a previous record exists. By previous record, we mean an infotype record that contains the date that is one day before the begin date of the current infotype record. Each line is identified with a number which is created by the priority. This column is used to ensure that the user bears restriction 7 in mind.

Reference Personnel Number (Infotype 0031)

The right column contains all the employee's reference personnel numbers which have been entered in the *Reference Personnel Number* (0031) infotype. This column is used to ensure that the user bears restriction 1 in mind.

In all three columns, the payroll area is specified for all reference personnel numbers. These reference personnel numbers belong in the infotype record's validity period. This should help the user to bear restriction 3 in mind.

In both the middle column and the right columns, the reference personnel number has a flag that has already been stored in the current priority.

All three columns are only displayed in the *change, create and copy modes.* In all other instances, only the left-hand column (the current priority) is displayed.

Choice of Reference Personnel Numbers

The personnel numbers that have been entered in the priority in the *Reference Personnel Number* (0121) infotype represent a reference personnel number subset for the employee.

In the priority, you must enter the *reference personnel numbers*

35. For which the payroll is to be run
36. Which can be used in a retroactive calculation or a forced retroactive calculation.

> Reference personnel numbers that have not been entered in the infotype *Reference Personnel Number Priority* (0121) will not be accounted in payroll! A check will not run to see if all the reference personnel numbers that fulfill one or both of the above criteria, have been maintained in the infotype! The end-user should be particularly careful here.

When a payroll is run, the *Reference Personnel Number Priority* (0121) infotype records that are valid for the payroll period concerned are read. This infotype record must contain all the reference personnel numbers that are relevant to payroll in the payroll period concerned. The overall payroll period can include several payroll periods. Any reference personnel numbers contained in this infotype record that are not relevant for payroll will not be accounted for in the payroll.

If a payroll has been started, and a (forced) retroactive calculation exists for a personnel number, then this will also be carried out simultaneously. As a result, more than one payroll period is accounted in a payroll run. In this instance, the system checks to see whether the validity period in additional records belonging to infotype 0121 intersects the overall payroll period (i.e. all the periods to be accounted). If this is the case, a check is run to see whether these infotype records contain reference personnel numbers for the employee that have not been considered. If so, then these reference personnel numbers will be checked for their relevance to payroll. If one of these reference personnel numbers does prove to be relevant for payroll, then the entire group of *reference personnel numbers* will be rejected by payroll.

Sales Data (Infotype 0900)

Within the master data stored for the *Sales and Distribution* (SD) application component, the **sales employee** is created as a special business partner. The sales employee processes business transactions within the enterprise.

In infotype *Sales Data* (0900), you can administer the sales employee as an employee in the *HR* component. In this way, the employee data can be administered using the personnel number.

Sales data

Assign the employee to a *Sales organization*, a *Sales office*, and a *Sales group*.

- If you have both the SD and HR SAP components in your enterprise, only the responsible personnel administrator can create a data record in the *Sales Data* infotype (0900).
- If you do not implement the HR component in your enterprise, the infotype record is created for the employee in the SD component.

Contractual and Company Agreements

Company Instructions (infotype 0035)

In the infotype *Company Instructions* (0035) you can enter what the employee has been instructed to do.

Subtypes are used to differentiate between company instructions. The standard system contains the following company instruction types:

- Subtype 01: *Accident prevention*
- Subtype 02: *Other instructions*

The standard SAP system does not use the *Company Instructions* infotype in evaluations. You can use this infotype for your own evaluations.

Corporate Function (infotype 0034)

In the *Corporate Function* (0034) infotype you can enter an employee's corporate functions.

Subtypes are used to differentiate between corporate functions. The standard system contains the following corporate functions:

- Subtype 01: *Course administrator*
- Subtype 02: *Full-time works council member*

The standard SAP system does not use the *Corporate Function* infotype in evaluations. You can use this infotype for your own evaluations.

Internal Control (Infotype 0032)

In the *Internal Control* infotype (0032), you can store the employee's internal control data.

Company Car

Data on the *Car regulation* and *Car value* is evaluated in the German payroll for calculating the imputed income for the private use of a company car.

In Switzerland, the field *Car regulation* controls the company car data on the wage statement.

You can use the Car Search List [Extern] report to create a list of car license plate numbers.

Work center

You can create an internal telephone book using the report RPLTEL00 (Telephone Directory). This report evaluates the fields *building number*, *room number*, and *in-house telephone number*.

Works Councils (infotype 0054)

The *Works Councils* infotype (0054) contains three comparable personnel numbers which are called up when running the payroll for a semi autonomous works council. Because this employee loses his/her nightwork and overtime bonuses due to his/her duties as a works council representative, he/she receives compensation. The system calculates this compensation by using the bonuses received by the comparable personnel numbers specified.

You only need to maintain this infotype for those employees who actually have a works council function.

Works Councils

Here enter the three *Comparable personnel numbers* for the works council representative who has been relieved from nightwork and overtime. The system will then enter the names of these persons in the predefined fields.

When the payroll for the works council pay is run, the system uses the nightwork and overtime bonuses of these employees to calculate a compensation for these bonuses that the employee has lost due to being a works council representative.

Communication (Infotype 0105)

Employees' communication IDs are stored in the infotype *Communication* (0105) .

An employee's communication ID is valid for a certain type of communication (e.g. R/3 System, Internet). The standard system contains the following communication types:

- **Subtype 0001: active SAP System**

  The key for the subtype in the active R/3 System must always correspond to the subtype key that you entered in Customizing for *Personnel Management* under menu path *Global Settings for Personnel Management* → *Indicate Active Communication System.*

- Subtype 0002: SAP2
- Subtype 0003: *Netpass*
- Subtype 0004: *TS01*
- Subtype 0005: *Telefax*
- Subtype 0006: *Voice-mail*
- Subtype 0010: *Internet address*
- Subtype 0011: *Credit card number(s)*

The infotype *Communication* (0105) performs the following tasks:

- It stores the system user name that is necessary for using *SAP-Business-Workflow* and *SAP-Office.* The user name that was set up in the subtype for the active SAP system is used for both of these applications.
- It stores an employee's communication data, for example, the fax number or the Internet address.

Communication

Here, you enter the communication type (e.g. R/3 System, Internet) and the employee's communication ID for the communication type.

Subtype 0011 (Credit card numbers)

You must store the employee's credit card number in the system for credit card clearing so that items booked on a credit card can be assigned to personnel numbers.

Because subtype 0011 (*Credit card numbers*) has time constraint 3, several entries can be available at any one time. This can be especially useful if an employee has several credit cards (or credit cards from different credit card companies).

To distinguish different credit card companies' cards from each other, the first two positions of the field *ID/number* have been defined with an ID code that corresponds to the individual credit card companies.

These identification codes are:

- AX (American Express)

- DI (Diners Club)
- EC (Euro Card)
- TP (Lufthansa AirPlus)
- VI (Visa)

Objects on Loan (Infotype 0040)

In the infotype *Objects on Loan* (0040), you can record what company assets an employee has received on loan.

Subtypes are used to differentiate between the different objects on loan. The standard system contains the following types of objects on loan:

- Subtype 01: *Key(s)*
- Subtype 02: *Clothing*
- Subtype 03: *Books*
- Subtype 04: *Tool(s)*
- Subtype 05: *Plant ID*
- Subtype 06: Tennis racket(s)

The standard SAP system does not use infotype Objects on Loan (0040) in reporting. You can use this infotype for your own evaluations.

The employee must be active in the organization since the validity start of the infotype record, that is, the status indicator in the *Employment* (STAT2) field of the *Actions* infotype (0000) must be 3 for this employee.

Contract Elements (Infotype 0016)

In the *Contract Elements* infotype (0016), you can store data related to the employee's employment contract.

Contractual Regulations

With the *Contract type* field, you can subdivide employment contracts in accordance with the planned duration of the work relationship and the employee's legal status. For temporary work relationships, you must enter the contract's expiry date. In addition, you can make a note that this person has been given permission to have a *sideline job*. The *Non-competition clause* refers to the period of time after the work relationship has ended. This clause specifies the sideline activities the employee is not permitted to carry out.

Payment Periods During Illness

The *Continued pay period* and the S*ick pay supplement period* are used for certain absences in the infotype *Absences* (2001).

Deadlines

Here, you can store the following:

- Probation period length
- Notice periods
- Date on which the work permit expires

Entry

In these fields, you enter and save information on the employee's initial entry date and the corporation to which he or she belongs.

When you first create a record for the *Contract Elements (0016)* infotype for the first time, the system suggests default values for the following fields:

- *Contract type*
- *Continued pay*
- *Sick pay supplement*
- *Probation period*
- *Notice period for ER*
- *Notice period for EE*

The default values are determined by the entries in the fields Co.code (Company code), Pers.Area (Personnel area), EEGroup (Employee group), and EESubgroup (Employee Subgroup) in the Organizational Assignment infotype (0001).

Country-Specific Features

- **Brazil:** Infotipo 0398: Componentes Contrato: Inf. Adic. (Brasil) [Extern]

Contract Elements (Infotype 0016)

- **Great Britain:** Contract Elements (Infotype 16): National Features (Great Britain) [Extern]

Powers of Attorney (infotype 0030)

In the *Powers of Attorney* infotype (0030), you can store data on the special authority that an employee has been given.

Subtypes are used to differentiate between powers of attorney. The standard system contains the following types of powers of attorney:

- Subtype 01: *Limited commercial power*
- Subtype 02: *General commercial power of attorney*
- Subtype 03: *Power of attorney for banking transactions*

Power of Attorney

You can also enter the *Organizational unit* to which the power of attorney applies.

Payroll

General Payroll Data

Payroll Status (Infotype 0003)

Definition

Infotype in which data on the *Payroll* status and *Time Management* status is stored.

For example, the system stores the date of the last payroll run performed for the employee in the *Payroll Status* infotype (0003).

The system can flag an employee that was rejected in the payroll run.

Use

The system automatically creates this infotype when the employee is hired. In general, the system updates the infotype and writes the changes to the payroll past.

Structure

You can change the payroll status of an individual employee using *Payroll/Retroactive Accounting* and *Time Evaluation*.

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Extern].

Basic Pay (Infotype 0008)

You can store the employee's basic pay in the *Basic Pay* infotype (0008) . You get an overview of the employee's payroll history using the infotype history.

The standard system contains the following reference types:

- Subtype 0: *Basic contract*
- Subtype 1: *Increase basic contract*
- Subtype 2: *Comparable domestic pay*
- Subtype 3: *Refund of costs in foreign currency*
- Subtype 4: *Local weighting allowance*

You can process the *Basic Pay* infotype (0008) on its own or during a personnel action. If you want to create a new infotype record, enter the reference type on the screen *Maintain HR Master Data*. The reference type is already set if you carry out a personnel action

Pay scale

The system automatically proposes the *Pay Scale Type* and the *Pay Scale Area*. However, you can overwrite these values.

Wage types

If you want to insert an infotype record, the system automatically suggests the wage types. There are a few wage types which you can not overwrite or delete. You can enter up to 20 wage types.

When an employee leaves a company you are not permitted to delimit the *Basic Pay* infotype (0008). Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

See also:

Enter Basic Pay [Extern]

Performing a Personnel Action [Extern]

Performing a Standard Pay Increase [Extern]

Appraisals (Infotype 0025)

Employees' performance appraisals are stored in the *Appraisals* (0025) infotype.

Various performance criteria exist in the system for employee performance appraisals. You can use and insert these as required.

The system provides the appraisal from the total of the appraisal criteria. The system suggests weightings for the individual appraisal criteria.

The system calculates the total value for appraisal criteria from the point value, by adding the weighting, and the correction value specified (optional). The individual point values are added to produce total points.

You can flag the performance appraisal so that it has an effect on the employee's wages/salary. In this case, using reports, you can create a relevant record in the *Basic Pay* infotype (0008) for the employee. A distinction is made between the following types of evaluation.

- Individual Appraisals

  In an individual appraisal, the money that corresponds to certain point values is determined by the basic pay of that employee. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Evaluation*) and create a batch-input session to determine the basic pay of the employee.

- Group Appraisals

  In a group appraisal, the money that corresponds to certain point values is determined by the basic pay and appraisals of all employees in that appraisal group. In this case, you must first execute report RPIBRT01 (*Group values for Appraisal Rating in T513G*). This report determines the money per point value for the performance appraisal group and assigns this money to the relevant performance appraisal group. In this case, use the report RPIBRT00 (*Batch-Input for Appraisal Rating*) and create a batch-input session to determine the basic pay of each individual employee in the group.

As a result, records for both appraisal types are created for each employee in the *Basic Pay* infotype (0008).

Appraisal

When you want to add a record in this infotype, the system proposes certain appraisal criteria and relevant weightings. You can overwrite or add to the proposed criteria.

In the *Appraisal* field, enter the points value for each appraisal criterion. Enter whole numbers. Higher numbers indicate better performance.

In the *Correction* field, you can enter additional points value for each appraisal criterion. Here, you can grade the point values more exactly than you can in the weighting field.

The system automatically determines the total points for each appraisal criterion based on:

- the weighting for the appraisal criterion
- the points that the appraiser has assigned to the appraisal criterion
- the correction value for the appraisal criterion

Moreover, the system automatically determines the total points for all appraisal criteria.

If your enterprise has a collective agreement which allows a group valuation, enter the employee's group number here also.

Appraisal Attributes

Enter the appraiser's name here and the date of the appraisal. In addition, you can indicate whether the performance appraisal should affect the relevant employee's salary and whether the employee has been notified of the appraisal.

If integration with *Personnel Development* is active and you require further information, see the *Personnel Development* documentation in the section Creating an Appraisal [Extern]

Employee Remuneration Info Infotype (2010)

Definition

You can use the *Employee remuneration info* infotype (2010) to enter wage types manually and specify information directly for Payroll.

If you work with time evaluation, you can transfer time balances directly using the Time Transfer Specifications [Extern] infotype (2012), which in turn has an effect on remuneration.

Use

These wage types are not generated automatically in payroll. Use infotype 2010 to enter wage data that has been calculated manually, such as premiums, bonuses for difficult working conditions or other special wage types.

You can adjust the wage types and subtypes of this infotype to your individual requirements in the Customizing system. Here, you can define, for example:

- The wage types that can be used here
- The fields in which data cen be entered
- Whether additional information can be entered for Accounting and Logistics
- Whether a wage type can be used once or several times per payroll period.

Structure

The following options can be used to control remuneration for a wage type in the infotype:

1. ***Number of hours, number, unit, and amount***

   If these fields contain entries, the system uses the values stored in the Customizing system for this wage type. If no *amount* is specified, you can enter one manually in the infotype.

2. ***Different payment***

   It is possible to enter additional data on a different payment for remuneration records on the entry screen or via *Goto* → *Different payment*.

- Assign a premium
- Re-define a payment by assigning a pay scale group and level
- Control payment by entering a different position
- Add or deduct a specific amount using the *Extra pay indicator* and the *Valuation basis*.

See also:

Maintaining Employee Remuneration Information [Extern]

Time Quota Compensation Infotype (0416)

Definition

Time quota compensation allows a financial remuneration of absence entitlements that have not been deducted by absences.

Use

You can use the *Time Quota Compensation* infotype (0416) to remunerate absence entitlements such as *Leave* or *Time in lieu of overtime*. When the compensations are recorded, the remaining quota or leave that has not been deducted or compensated is reduced by the specified amount.

Structure

- Various methods for compensating quota remainders are defined in Customizing. They simplify the recording of quota compensation. You choose the method you require by specifying a subtype for the infotype.

  For more information, see Methods for Compensating Time Quotas [Extern]

- The list of *absence quotas* in the infotype shows which quotas can be compensated. It displays all the employee's absence entitlements that are available for deduction on the current day.

  You can branch to the corresponding infotype record by double-clicking the absence quota. This shows additional, detailed information on the quota, such as whether deduction can result in a negative value, for example.

- You can project a recorded compensation. In this process, the SAP System calculates anticipated changes to the quota, without saving the data record. This process is recommended
- If you are unsure whether there is enough remaining quota to perform compensation
- If you want to check which quotas are reduced by a compensation
- You have the option of checking the specified compensation before saving. The check enables you to view which quotas are reduced by the compensation and by how much.
- You can compensate all of an employee's quotas at the same time. This process is recommended if, for example, an employee leaves the company. You must be able to perform *free compensation* to be able to do this.

  The SAP System automatically writes the quota remainder for each quota type to the number field of the compensation in the list of quotas. You can overwrite the number that is determined automatically.

Additional Payments (Infotype 0015)

In the infotype *Additional Payments* (0015), you can enter an amount and/or a value and a unit of measurement in a wage type; these are always paid or deducted in a certain period during payroll. Additional payments are wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for additional payments for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Recording Cost Assignment Specifications [Extern] in *Personnel Administration*.

The standard system contains, amongst others, the following wage types:

- Subtype M110: Vacation bonus
- Subtype M120: Christmas bonus
- Subtype M30: *Special payment*
- …

Additional Payments

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination entered. The currency is defaulted according to the company code. This can be overwritten.

The system uses the last day of the current payroll period as the date of origin of the additional payment. You can overwrite this default value by

- entering another date in the field *Date of origin*
- entering the required payroll period and payroll year in the fields *Default date*.

  If you enter a different payroll period in the fields *Default date* the system defaults the last day of the specified payroll period as the date of origin.

  If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Edit Additional Payments [Extern]

Membership Fees (Infotype 0057)

In the infotype *Membership Fees* (0057), you can record the membership fees for each employee. These can be membership fees for a union, a works council, a sports club, or another organization.

The *Membership Fees* (0057) infotype is used in payroll. An employee's membership contributions are either indirectly determined in payroll, or you can enter them directly in the *Membership Fees* infotype (0057).

Subtypes are used to differentiate between the different membership fees. Each subtype represents a type of organization. The standard SAP system contains the following organization types:

- Subtype 1: *Union*
- Subtype 2: W*orks council*
- Subtype 3: *Sports club*
- Subtype E001: *Union, CCOO*
- Subtype E002: *Union, UGT*
- Subtype E003: *Union, CNT*
- Subtype E004: *Union, USO*

You can set up additional organization types as subtypes in Customizing.

Payment Data

Enter the relevant wage type for membership here.

Payee

Enter the bank details of the organization entitled to the employee's membership fees.

Notifications Infotype (0128)

Definition

In the Notifications Infotype (0128) you define the additional information that should be printed on your employee's remuneration statement. For example, messages from management and birthday congratulations.

Structure

The *Notifications* infotype (0128) has the following subtypes in the standard system.

- Subtype 1: *General notifications*

  In this subtype you assign a text module to a personnel number. You have created the text module previously using the function *Tools →SAPscript →Standardtext*. You cannot edit the text module directly in the *Notifications* Infotype (0128).

- Subtype 2: *Personal notifications*

  In this subtype you edit an individual text module for the personnel number in question. You can **only** edit and display this text directly in the infotype.

Standard Wage Maintenance (Infotype 0052)

Definition

The wage maintenance amount is calculated by the system and is the difference between the current and guaranteed pay. You enter the guaranteed pay for your employee in the *Standard Wage Maintenance* infotype (0052),.

Use

You can determine the wage maintenance amount using different reasons and different adjustment types. Please refer to the section Standard Wage Maintenance [Extern].

Standard wage maintenance type

The wage maintenance types set up in Customizing are called as subtypes. You can create several wage maintenance types for an employee.

Pay scales

You can either enter data in the *Pay Scale Type*, *Pay Scale Area* and *Pay Scale Group* fields, or you can save them without data. The *pay scale group* and *pay scale level* are used for the indirect valuation of wage maintenance wage types and are not required for direct valuation.

Wage types

You can only enter wage types set up for wage maintenance in Customizing. The wage type list can include up to 20 wage types.

Wage types that are included in the total are flagged with an X in the *T* field.

Wage type valuation

You can either valuate the wage types directly, or they can be indirectly valuated by the system.

For indirect valuations, an infotype record must be created for the employee in the *Planned Working Time* infotype (0007). If the indirect valuation is only valid until a date that is before the validity end of the record, the system displays an appropriate message. If this is the case, you can enter the date on which indirect valuation should take place again.

Indirectly-valuated wage types are flagged with an I after the amount.

For more information on wage type valuation, refer to the section Valuating Wage Types [Extern].

Recurring Payments/Deductions (Infotype 0014)

In the *Recurring Payments/Deductions* infotype (0014), you can enter an amount and/or a value and a unit of measurement for a wage type that is always paid or deducted during payroll. Recurring payments/deductions are wage elements which are paid or deducted in every payroll period. In contrast to additional payments, recurring payments/deductions are paid or deducted within a defined periodicity.

In addition, you have the possibility to enter default cost assignment settings for recurring payments/deductions for the application component *Controlling* (CO). You can store a different cost center and company code combination than the one in the *Organizational Assignment* infotype (0001); the additional payments will then be charged to this cost center. Select *Edit* → *Maintain cost assignment*. The *Default Cost Assignment Settings* dialog box appears. Enter the relevant data. If any data has already been entered for the cost assignment it will be displayed on the infotype single screen. You can set up further controlling objects using customizing in the section Enter Default Cost Assignment Settings [Extern] in *Personnel Administration*

The standard system contains, amongst others, the following wage types:

- Subtype M110: *Vacation allowance*
- Subtype M120: *Holiday bonus*
- Subtype M130: *Standard special payment*
- …

Recurr. Pay/Deduc

Enter the wage type that is to be paid or deducted in the *Wage Type* field. In conjunction with the *Wage type* you must process either the *Amount* field or the *Number* and *Unit* fields. The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

Date of Payment

A wage type is only paid in certain periods or on certain days. These periods or days can be defined either in the *1st payment period* and *Interval in periods* fields, thus defining the interval to the next and all subsequent periods, or in the *1st payment date* and *Interval/Unit* fields, thus defining the interval to the next day and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

If the report RPCDTBX0 (Preliminary Data Medium Exchange Program for Separate Payment Run) has created a preliminary document for a wage type transfer, the *Transfer* field is displayed on the infotype screen. You can not delete the wage type in this case.

See also:

Define Recurring Payments and Deductions [Extern]

Country-Specific Features

- **Great Britain:** Recurring Payments/Deductions (Infotype 0014): National Features Great Britain [Extern]

Loans

Company Loans (Infotype 0045)

Definition

You use this infotype to enter all the loan data. This infotype contains information on:

- Basic data
- Conditions
- Payments

Use

During the payroll run, the data in the *Loans* infotype (0045) is used to calculate the following values:

- Loan deductions
- Loan interest calculation
- Imputed income taxation

Structure

Loan Types

The loan types are stored as subtypes in the *Loans* infotype (0045). Every loan that you create gets a sequential number. The combination of loan type and sequential number makes is possible for the system to clearly identify every loan. This makes it possible for you to create several loans of the same type for an employee.

When creating a loan, the system always proposes a sequential number. Depending on whether you create a loan of the same type for an employee or just want to change the conditions of a loan that already exists, you must either keep or change the sequential number proposed by the system:

- If you want to create a new loan and create a new infotype record for this purpose, the system suggests a new sequential number that has not been used before. We recommend that you **keep** this number.
- If you want to create a new loan and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **change** this number. We recommend that you first of all check the list of existing infotype records to see which sequential numbers have already been assigned to this employee. If you use an existing sequential number, the system cannot clearly assign payments to a loan.

- If you want to change the conditions of a loan that already exists and copy an existing infotype record for this purpose, the system will suggest the sequential number of the infotype record you have copied. You must **keep** this number.

Tab Pages

On the *Basic data* tab page, enter the date of approval and the amount of the loan. The status of the loan is also displayed here. However, payments and special payments that you have entered after the last payroll run, are not taken into consideration.

On the *Conditions* tab page, you enter the relevant loan conditions. You also specify when repayment should begin. Regardless of this, interest payments are included in the payroll run, immediately after the loan is paid to the employee.

On the *Payments* tab page, you enter all the payments that are made by your company or employee with regard to the loan.

Payments

On the *Payments* tab page you enter outgoing payments, repayments and other payments, for example, loan charges. You can pay a maximum of the approved amount to the employee. The approved amount is occasionally paid in several partial amounts.

The approval of a loan does not automatically lead to payment. You should only allocate the loan payment on the *Payments* tab page.

Payments that have already been included in the payroll run are inactive and can not be changed, as you usually do not make changes to such payments. However, if you want to process a payment that has already been accounted, select it and choose . The payment is then released for processing.

Subsequent changes to payments trigger retroactive accounting in *Payroll.*

Payment Types

There are various payment types available for entering payments. The payment types differentiate between payments according to:

- Whether it is a case of a payment to the borrower or a repayment to the employer
- Whether the payment is made directly by check or bank transfer or is cleared with the employee's remuneration during the payroll run

We recommend that you use the payment types provided by SAP as far as this is possible. However, if you require your own payment types, you can set these up in

Payroll Customizing under *Loans* → *Master Data* → Customer Payment Types [Extern].

Using Payment Types

Payment type	Use	Comment/Example
Outgoing payment to third-party	You do not want to pay out the loan to the employee, you want pay it to a third person instead.	An employee receives a building loan to build a house. You do not pay the loan to the employee, but to the contractor who builds the house.
Loan payment (payroll)	You want to pay the employee the total approved amount of the loan or part of this together with his/her pay.	
Loan payment (external)	You want to pay the employee the total approved amount of the loan or part of this by check or bank transfer.	
Loan remission	An employee cannot repay his/her loan or you want to release him/her from the remaining debt.	You can only close a loan in the system when the remaining loan amount has either been repaid by the borrower or remitted by the lender.
Fees	You want to demand fees from your employee for granting the loan.	
Total repayment	The employee repays the total outstanding amount of the loan by check or bank transfer.	
Special repayment (payroll)	The employee makes an unscheduled repayment that should be withheld from his/her pay.	
Special repayment (external)	The employee makes an unscheduled repayment by check or bank transfer.	
Loan balance transfer	You want to transfer company loans from a legacy system.	You can also use the payment type *Loan payment (external)* for transferring loans from legacy systems.

The *Special Repayment (External)* and *Complete Repayment* payment types can both be used for a direct repayment by check or bank transfer. These payment types have different types of interest calculation:

- In the case of *special repayment (external),* the day you specify as the payment date is **not** taken into consideration in interest calculation.

- In the case of *total repayment*, this day is taken into consideration in interest calculation.

If you want to enter a repayment for an employee, that leaves the company or changes company code, use the *Total repayment* payment type. This guarantees that interest is calculated for the loan even for the last day that the employee works in the company or is assigned to the old company code.

The employee Anne Lovelace leaves your company on April 30. She was granted a company loan. You want to enter an external repayment for this loan on April 30. If you enter the repayment as a *special repayment (external)* with the payment date of April 30th, no more interest is calculated for the loan for this day. If you enter the payment as a complete repayment with the payment date as April 30, interest will still accrue for this day. As Anne Lovelace is no longer an employee in your company on May 01, you can not enter the payment as a *special repayment (external)* with the payment date as May 01, so that interest can still be calculated for April 30.

Integration

The correct repayment of a loan is only guaranteed when there is a valid infotype record for the *Loans* infotype (0045). That is why *Payroll* is interrupted with an error message when there is no valid infotype record for an open loan. This can, for example, occur when the validity of a loan created was underestimated. You must therefore extend the validity of the loan in a case like this. When doing so, proceed as described in correct incorrect entries [Extern].

Once the employee has completely repaid the loan, a message is displayed in the payroll log. We recommend that you delimit loans that are completely repaid in the *Loans* infotype (0045).

See also:

Company Loans (Infotype 0045): National Features Great Britain [Extern]

Company Loans (Infotype 0045): National Features Belgium [Extern]

Loans (Infotype 0045): Features for Venezuela [Extern]

Insurance

Insurance (Infotype 0037)

You can store the employee's insurance data in the *Insurance* infotype (0037).

Subtypes are used to differentiate between the different insurance types. The standard system contains the following insurance types that have been defined as subtypes:

- Subtype 0001: *Company insurance*
- Subtype 0002: *Group accident insurance*
- Subtype 0003: *Life insurance*
- Subtype 0005: *Supplementary insurance*
- Subtype 0010: *Not liable*
- Subtype 0011: *Risk*
- Subtype 0012: *Risk/pension*
- Subtype 0020: *Nursing care*
- Subtype 0021: *Sick pay*

You can set up additional insurance types as subtypes in customizing.

Please note that separate infotypes are available for creating social insurance data (*Social Insurance Germany* (0013)) and pension insurance/direct insurance (*Company Insurance* (0026)).

Insurance data

Enter the following data:

- *Insurance type*
- *Insurance company*
- *Insurance number*
- *Insurance total*
- *Insurance premium*

The standard SAP system does not use this infotype in reporting. You can use this infotype for your own evaluations.

Evaluation Bases

Date Specifications (infotype 0041)

You can record the following information in the *Date Specifications* infotype (0041): The *Date type* specifies the type of information.

A concrete *Date type* (specified by the user) is used in a series of reports, for example to evaluate an entry date that cannot be derived from the organizational assignment history but which is stored in the infotype *Date Specifications* (0041).

This infotype can be used in payroll as well as for the leave program.

Date Specification

The standard system contains 12 combinations of *Date type* and *Date.* If you require more than 12 date specifications for an employee at the same time, you can use time constraint 3.

Make an entry either in both fields or none of the fields.

Monitoring of Tasks (Infotype 0019)

You can create automatic monitoring of tasks for all HR activities that have follow-up activities in the *Monitoring of Tasks* infotype (0019). Depending on the selected task type, the SAP system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule.

Task

The standard system contains the following task types:

- Subtype 01: *Expiry of probation*
- Subtype 02: *Temporary contract*
- Subtype 03: *Pay scale jump*
- Subtype 04: *Work permit*
- Subtype 05: *Severe challenge*
- Subtype 06: *Training period*
- Subtype 07: *Dismissal protection*
- Subtype 08: *Expiry of inactive contract*
- Subtype 09: *Expiry of temporary contract*
- Subtype 10: *Personal interview*
- Subtype 11: *Vaccination date*
- Subtype 20: *End of maternity protection*
- Subtype 21: *End of maternity leave*
- Subtype 30: *Follow-up medical*
- Subtype 35: *Submit PI number*
- Subtype 36: *Submit AHV-ID*
- Subtype 40: *Prior attachment*
- Subtype 70: *Next appraisal*
- Subtype 71: *Work permit expires*

Reminder

The information stored for the *Reminder* is entered using the *Reminder date* and the *Lead/follow-up time.*

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

  If the operation indicator for the relevant task type has the value *Blank* or – (*Minus*), then the reminder date cannot fall after the actual task.

If the operation indicator has the value **+** (*Plus*), then the reminder date cannot fall before the task.

- The system suggests a default date independently of the task type. This date can be overwritten at any time.
- You enter a lead time in the form of a number, unit and the operation indicator. The system calculates the reminder date from this.

  If you simultaneously enter the reminder date, the number, and unit for the lead or follow-up time, then the reminder date entered will be ignored.

Authorization Administration

Test Procedures (Infotype 0130)

You store the test procedures that have been carried out for your employees in the infotype *Test Procedures* (0130).

Both the test procedure key (which is represented by a subtype of the infotype 0130) and a release date belong to the test procedures. The following data is stored in infotype 0130 as additional information:

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

PE - Training and Event Managment

Prices (Infotype 1021)

Definition

This infotype lets you specify a price for each business event type. This is the price that an attendee has to pay for attendance at a business event. When you create or plan a business event, the price stored for the event type is proposed as default. You can change this price as required. When you book attendance, you can also change this price for each attendee if required.

Use

The *Prices* infotype is used in the following reports:

- *Business Event Prices*
- *Attendance and sales statistics*
- *Maintain prices infotype*

Structure

Specifying prices

- You can specify:
  - an *internal price* for internal activity allocation
  - an *external price* for external billing
- You must specify the price in the appropriate currency.

  Depending on the settings you make in Customizing under *Set up control parameters for Cost Accounting*, attendance bookings are processed either free of charge or using the prices stored for each business event type.

Infotype maintenance

You can maintain the *Prices* infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create business event type*.

When you create a business event or book attendance, you can either adopt the prices stored for the business event type, or you can overwrite the proposed prices.

By choosing *Business events* → *Price proposal*, you can determine a price based on the business event costs and transfer this to the *Prices* infotype.

See also:

Price Proposal [Extern]

Availability Indicators (Infotype 1023)

Definition

An infotype you store for resource types to specify all of the reservation conditions attached to resources of this type.

In this infotype, you specify:

- how resources of this type are classified during resource reservation (indicator *required*)
- In what *quantities* the resources are required
- Whether resources of this type are *location-dependent*.
- That resources of the categories *instructor* or *material* can be found during resource reservation (*Alternative resource search*)

Use

The *Availability Indicators* infotype is used with the following functions and reports:

- In resource selection when you create a business event
- When you request these reports:
  - Resources Not Yet Assigned per Business Event [Extern]
  - Ressourcenbelegung pro Ressourcentyp [Extern]

Structure

Resources

- You can classify a resource type as *room, instructor, material,* or *other resource*. We distinguish between these resource types due to the different characteristics they have.
  - You can specify a minimum, optimum and maximum capacity for the resource type *Room.* This value is then used when the system calculates the number of attendees for a business event during the *Booking* function.

    See also:

    Capacity (Infotype 1024) [Seite 1321]
  - For the resource type *Instructor,* the system proposes a specific relationship with the business event type if you select *Alternative resource search*.
  - For the resource type *Material,* the system proposes a specific relationship with the business event type if you select *Alternative resource search*.
- You can flag resource types as *location-dependent.* If you have activated the *location* switch in your *Training and Event Management* system, the system checks to ensure that a resource is available at the location in question when you reserve resources for a business event.

You can specify whether or not you want to use locations in Customizing for *Training and Event Management* under *Business Event Preparation* → *Location* → *Use of Business Event Locations.*

- You can flag a resource type as *required*. You only have to reserve resources that are flagged as *required*, reservation of other resources is optional.

  When you choose *automatic resource assignment*, the system only reserves resources that are flagged as *required*.

  See also: Selecting Resources [Extern]

- You can specify whether a resource type that is flagged as *required* can be reserved once only *(single reservation)* or multiple times (*multiple reservation)*.
- You can use the *resource priority* feature to define the sequence in which resources are allocated when resources are reserved for a business event date.

Amount available

You can specify per resource type the number of resources that should be available *per business event* and *per attendee.* The required number of resources is derived from the information stored here when a business event is planned.

Alternative resource search

In the *Alternative resource search,* you specify the object type of a resource other than object type G, such as H for *external person* or M for *material*. (Only *rooms* and *other resources* have object type G.) You also specify the relationship between the business event type and the resource type *Instructor* or *Material*.

There is a direct relationship between object type R (resource type) and object type G (*Room* or *Other resource*) so that you do not need to make any further entries for resources that have object type G. They are offered automatically for selection during resource reservation. The reason you must make additional specifications in the *Alternative resource search* is to ensure that the system offers and finds resources that do not have object type G.

If you select resources that belong to the category *instructor* or *material* here, the system automatically defaults the pertinent object types and relationships in *the alternative resource search*. For instructors, the entry * (asterisk) is the default object type. This stands for all object types. If you do not want to restrict the search to a specific object type, you can reserve instructors with different object types for your business events.

In addition, you must also specify the relationships between the business event type and the material ID or the instructor ID.

See also: Business Event Types [Extern] (paragraph *Structure* under *Relationships*)

Infotype maintenance

You maintain this infotype in Customizing under *Business Event Preparation* or in Current Settings under Create Resource Type [Extern].

Capacity (Infotype 1024)

Definition

Infotype that lets you specify the minimum, optimum, and maximum capacity for resource types, resources, business event types, and business events. If the *minimum* capacity defined for a business event is not reached, the system proposes that the event should be canceled when you go to *firmly book* the event. The *optimum* capacity is used to calculate the resources required and the costs expected. The *maximum* capacity is the maximum number of attendees allowed for a business event.

Use

The *Capacity* infotype is used:

- During resource selection when you reserve resources for a business event to determine the optimum number of attendees for which a resource type should be reserved.
- During resource selection when you reserve resources for a business event to determine the room capacity.
- During attendance booking to monitor the permitted number of essential and normal bookings. The capacities of the room and the business event are compared to establish the overall capacity of the business event.

  This value is determined at runtime only. The overall capacity of the business event is displayed on the *Book Attendance* data screen under *Business Event Data* and also in the dynamic *Attendance, Business Event, Tool* and *Information* menus (by double-clicking the traffic light icon beside the business event dates).
- For the function Price Proposal [Extern] when the business event price is based on the optimum capacity of the business event.

Structure

The following rules are applied for calculating the overall capacity of a business event:

- Minimum capacity of a business event is the higher of the minimum capacities defined for the resources and the business event.
- Optimum capacity of a business event is the lower of the optimum capacities defined for the resources and the business event.
- Maximum capacity of a business event is the lower of the maximum capacities defined for the resources and the business event.

  The following capacity values are stored for a business event:

  Minimum = 5, Optimum = 10, Maximum = 15

  The room in which the event is to be held has the following capacity values stored:

  Minimum = 2, Optimum = 12, Maximum = 12

The resulting capacity values relevant for attendance bookings are:

Minimum = 5, Optimum = 10, Maximum = 12

If a resource does not have a *Capacity* infotype record, the capacity values stored for the resource type are taken. If a business event does not have a *Capacity* infotype record, the capacity values stored for the business event type are taken.

If none of these objects has capacity values stored for them, the system takes the standard capacity defined in Customizing for *Training and Event Management* under *Business Event Catalog* → *Control Elements* (switch SEMIN KAP).

- If the minimum capacity is larger than the maximum, the values for optimum and minimum are automatically matched to the maximum value.

  The following capacity values are stored for a business event:

  Minimum = 10, Optimum = 15, Maximum = 20

  The room in which the event is to be held has the following capacity values stored:

  Minimum = 2, Optimum = 5, Maximum = 8

  The resulting capacities are:

  Minimum = 8, Optimum = 8, Maximum = 8

- If the optimum capacity only is smaller than the minimum, the optimum is matched to the minimum.

  The following capacity values are stored for the business event:

  Minimum = 10, Optimum = 15, Maximum = 20

  The room in which the event is to be held has the following capacity values stored:

  Minimum = 3, Optimum = 9, Maximum = 12

  The resulting capacities are:

  Minimum = 9, Optimum = 9, Maximum = 12

Infotype maintenance

- You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create resource type.* This value is proposed as the default value when you create the resource *Room* in the step *Create room*. You can overwrite it.
- If you want to specify the number of attendees, you can maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create business event type*. This capacity is proposed as the default value when you plan or create a business event.

Business Event Info (Infotype 1026)

Definition

This infotype lets you append the following additional information indicators to a business event: internal or external flag, session flag, business event language, lock flag, and delete flag.

Use

The *Business Event Info* infotype is used:

- To determine the language in which a business event will be held.
- To establish whether the business event in question is internal or external.
- To determine whether a business event is locked or deleted when you book attendance, since bookings are not allowed for a business event that has been locked or deleted.

Structure

The *Business Event Info* infotype comprises the following information:

Internal/external flag

This indicator shows whether the business event in question is being conducted by the company itself (internal event) or by an external organizer (external event).

Session flag

The function that requires this indicator is not yet available.

Business event language

The business event language specifies the language in which a business event is to be held. You can always change the language you specify here at a later stage.

Lock flag

When you lock a business event because you do not want to allow any further attendance bookings for the time being, a lock indicator is automatically written in the infotype.

Deletion flag

When you cancel a business event, a deletion flag is automatically written in the infotype.

Infotype maintenance

This infotype is maintained automatically when you:

- create or plan a business event
- lock or cancel a business event

Site-Dependent Additional Info (Infotype 1027)

Definition

This infotype allows you to store additional information valid for locations (sites). Such information might include the local calendar, the currency, and the language normally used at a location.

Use

The *Site-Dependent Additional Info* infotype is used:

- To take non-working days into account when planning and creating business events.

Structure

The *Site-Dependent Additional Info* infotype comprises the following information:

Calendar ID

You specify here the factory calendar that should be used when planning a business event for a particular location. This factory calendar is used to determine what days are not workdays at the location in question.

You must first define the factory calendar in Customizing for Training and Event Management under *Basic Settings* → *Controlling Days Off* → *Specify Factory Calendar.*

Language

You specify here the *language* in which business events are normally held at this location.

Infotype maintenance

You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current settings* under *Create location.*

Address (Infotype 1028)

Definition

This infotype allows you to record attendee addresses and building addresses as location information for rooms.

Use

The *Address* infotype is used in Correspondence when notifications such as attendance confirmations or registration confirmation are issued. You can control whether a permanent or a temporary address is used by setting variables in Correspondence.

Structure

You can enter the following location-specific information for a building:

- *Name of building*
- *Room number*

  You create building addresses separately. The building data you store is inherited by the room.
- *Telephone*
- *Fax number*

You can also enter the following address information:

- *Address supplement*
- House number, street
  - Postal code, city
- *Country key*
- *Region*
- *Distance in kilometers*

Since this infotype can be subdivided into subtypes, you can specify more than one address. The following subtypes have already been set up in the SAP R/3 Standard System:

Subtype Blank: *Permanent address*

Subtype 0001: *Temporary address*

Infotype maintenance

You maintain this infotype in Customizing or in *Current Settings* by choosing:

- *Creating a Location*
- *Creating a Room*
- *Creating a Company*

Address (Infotype 1028)

- *Create External Instructor*

  Before you can maintain building addresses with location information for rooms, you must first work your way through the step *Business Event Preparation→ Set up building addresses* in *Current Settings* or in Customizing for *Training and Event Management.*

Business Event Type Info (Infotype 1029)

Definition

Infotype that lets you store a variety of additional information about a business event type, such as whether the event type should feature in the Employee Self-Service *Training Center*.

Use

The *Business Event Type Info* infotype is used in the following reports and functions:

- In the *business event brochure* report, you can compile a list of business events whose business event types have been flagged for inclusion in the brochure.
- The *convention* flag is used when you book attendance, plan and create business events.
- The indicator *No Intranet* is used to exclude events from display in the Employee Self-Service *Training Center*.
- If your system is integrated with *Time Management*, you can use this infotype to override general settings made in Customizing regarding *Time Management*. For example, it lets you specify that an employee (object type P) may attend a business event on a day off.

Structure

The *Business Event Type Info* infotype includes the following information:

- The *Convention* indicator to specify that a business event type is a multi-session event consisting of multiple sessions running in parallel.
- The indicator *Include in brochure* to specify that a business event type should be included in the business event brochure. When you start the report to generate the event brochure, you can select the option *Selected event types only*. In this case, only event types feature in the brochure for which this indicator has been specifically set.
- The indicator *No Intranet* lets you specify that certain event types are to be excluded from display in the Employee Self-Service *Training Center*.
- In this infotype, you can also make specifications for internal attendees and instructors that apply to the *Time Management* component:
  - *No integration*: You use this indicator to deactivate integration with *Time Management* for attendees and instructors of events of this type. This means that no attendance and absence records are written to *Time Management*.
  - *Allowed in time off*: You use this indicator to specify that a person can attend or hold an event of a certain type even if time off records have been stored for the person during the same period in *Time Management*.
  - *Minimum percentage* (for attendees only): You can use this entry to specify the minimum amount of time an attendee must be present at an event to qualify as attendance. If the value you specify here is not recorded for an attendee, the attendance booking is considered to be insufficient and is automatically canceled. Here, you enter a percentage of the complete event duration.

    This entry overrides the value stored for the event type in the SEMIN TIMEP entry under *Integration* → *Time Management* → *Specify Attendance Types.*

Infotype maintenance

You maintain this infotype in Customizing for *Training and Event Management* or in *Current Settings* under *Create business event type*.

Procedure (Infotype 1030)

Definition

An infotype you can store for business event types to specify system reactions to booking and prebooking checks and to specify what actions are to be carried out during follow-up processing.

Use

The *Procedure* infotype is used for checking purposes with all booking and prebooking functions.

The data stored in this infotype is also used after a business event has been attended so that the appropriate follow-up processing can be carried out.

Structure

You define the procedure for the following checks:

- For bookings for business events of the same type
- For prebookings for the same business event type
- For attendance prerequisites (business events previously attended)
- For qualifications and alternative qualifications that are required for attendance of a business event

The system can execute the following actions once attendance has been completed:

- Transfer the business event objectives to the attendee in the form of qualifications
- Delete the attendance relationship between the business event and the attendee
- Create an *attendance history* relationship between the attendee and the business event type for the purpose of checking the attendee's attendance prerequisites for future bookings.

Integration

You can maintain the *Prices* infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create business event type*.

You can also maintain the individual checks in Customizing under *Day-to-Day Activities* → *Booking* → *Attendee checks*. Under *Recurring Activities* → *Follow-Up Processing* you specify the actions that are to be carried out for business events follow-up processing.

If you create the *Procedure* infotype for a business event type, you override *all* of the procedure settings that generally apply for business event types. You make these settings in Customizing for *Training and Event Management* under *Day-to-Day Activities* → *Booking* → *Attendee Checks* and under *Recurring Activities* → *Follow-up*.

Mail Address (Infotype 1032)

Definition

Infotype that lets you store e-mail addresses and other relevant mail information for attendees and instructors (of the object types *External Person*, *Company* and *Organizational Unit*) in *Training and Event Management*.

Use

If this infotype is maintained for attendees and instructors, correspondence notifications regarding activities in *Training and Event Management* can be sent to them by Internet Mail or R/3 Mail if this medium is specified for automatic or manual correspondence output.

Structure

Mail address type: Enter the type of mail system to which the mail address or user name belongs. The subsequent entries you must make depend on the address type you specify:

Internet Mail: You must enter a full Internet e-mail address (SMTP) for this address type.

For the R/3 Mail System you can select one of the following subtypes:

Productive SAP System

SAP1

SAP2

If you choose one of the address types for the R/3 Mail System, under *User* you must also specify the *Office user name* that the user has in the corresponding SAP System. Or under *User* you enter a valid *distribution list* and under *Owner* the owner of the distribution list you specified.

Integration

You can maintain this infotype for the following object types as a rule:

- External Person
- Company
- Organizational unit
- Work center
- Position

Name Format (Infotype 1034)

Definition

An infotype that lets you store information about the formatting used for an external person's [Extern] name, name affixes and so on.

Use

Information on the name format is used in particular in the Correspondence component of *Training and Event Management*.

Structure

Name component information is required for formatting an *external person's* name. The following name components exist:

- *Form of address* (for example: Mr., Mrs., Ms) (required entry)
- *Academic title* (for example: Dr., Prof.) (optional entry)
- *Surname prefix* (for example: Von, van der, de la) (optional entry)
- *Name affix (*for example: Lord, Lady) (optional entry)

Besides the name components, you must also specify a person's language and nationality.

This lets you format an external person's name in the way that is usual for this person's country for correspondence purposes. Correspondence notifications are sent in the language specified.

Infotype maintenance

You maintain this infotype when you change or create external persons as attendees or instructors on the *SAP Easy Access* screen under *Training and Event Management* → *Settings* → *Current Settings* → *Attendee* or *Resource Management* → *External Instructor* (*External Person*).

You can set up the required format (per nationality) in Customizing under *Day-to-Day Activities* → *Correspondence* → *Form Creation* → *Specify Name Format for Recipients*.

Schedule (Infotype 1035)

Definition

This infotype lets you define a schedule, or timetable, for a business event.

Use

This infotype is used for the following functions:

- The schedule determines attendance times for attendees. This data is required for attendance records if integration with *Time Management* is active.
- The data in the infotype is used to define a business event schedule.
- The schedule also determines the resource reservation for a business event.

Structure

The schedule contains the following information:

- Day number
- Date
- Start and end time
- Flag indicating days off
- Duration in days
- Duration in hours
- Flag indicating a generalized schedule

A *generalized schedule* exists if you created the schedule model *without a pattern.*

In a generalized schedule, each of the days between the start date and end date of the business event (business event date) has a start time of 00.00 hours and an end time of 23:59 hours.

Infotype maintenance

When you create or plan a business event, you can create a schedule either by copying the schedule model of the business event type or by defining a specific schedule for the business event.

See also:

Creating a Schedule [Extern]

Costs (Infotype 1036)

Definition

This infotype lets you store costs, divided into cost items, per resource type, per resource, per business event type, or per business event.

Use

The data in the *Costs* infotype is used to record and manage the costs that arise in *Training and Event Management*.

A price proposal [Extern] can be calculated for a business event based on the total costs, and this price can be transferred to cost accounting.

Structure

- If required, you can subdivide costs into subtypes. The following subtype has been set up in the standard system:

  Subtype 0001: *Normal case*

- You can use the *cost items* that you defined in Customizing in the *step Define Cost Items*. To do this, you must already have completed the step Define Cost Items [Extern] in Customizing.
- You can define your own values by selecting *Dir.* (direct input). In this case, you enter an *amount* and a *currency*.
- You can define a cost item per *business event* or per *attendee*.

  Alternatively, you can define a cost item based on a *time unit* instead or on a time unit and an attendee combined.

Infotype maintenance

You maintain this infotype in Customizing or under *Current settings* on the *Training and Event Management* screen in the following steps:

- *Creating a Resource Type*
- *Create resource*
- *Create business event type*

And also in the following functions:

- *Create business event*
- Change business event date

Billing/Allocation Info (Infotype 1037)

Definition

This infotype lets you assign sales areas to business event types and to the organizers (usually organizational units) of business events.

Use

The *Billing/Allocation Info* infotype is used to perform billing and activity allocation for attendance fees:

- In billing, the sales area is used, for example, for the conditions per customer.
- In internal activity allocation, the activity type for the service rendered (activity type for event attendance or instructor function) is used.

Structure

You can store the following information for the billing and activity allocation of business event fees in this infotype:

- *Sales area*: The sales area consists of:
  - A *sales organization* (organizational unit that is responsible for the sale of particular products or services)
  - A *distribution channel* (channel via which goods or services reach customers)
  - A *division* (grouping together of materials, products and services).
- *Account assignment group material* (for revenue account determination)
- *Activity type*: The activity type is used to divide up the services (activities) rendered in a cost center according to cost accounting criteria. You must specify the following:
  - *Controlling area*
  - *Activity type for event attendance*
  - *Activity type for instructor function*

Infotype maintenance

You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current settings* under *Create business event type* and *Create organizational unit*.

Business Event Blocks (Infotype 1041)

Definition

This infotype lets you store the names and descriptions of the business event blocks used in conjunction with conventions.

Use

The *Business event blocks* infotype is used for multi-session events of the type *Convention*.

The information stored here serves to identify the individual tracks and sessions of a convention.

Structure

The *Business event blocks* infotype includes the following information:

- Block IDs, that is, the session names
- Block texts, that is, the description of a session

Infotype maintenance

The infotype is maintained automatically when you create a convention.

Schedule Model (Infotype 1042)

Definition

This infotype lets you record a schedule model, that is, the timetable for a business event type.

Use

The data in the *Schedule Model* infotype is used:

- To display the business event duration in the business event brochure
- To display the schedule model in the business event menu
- As a copy template for the schedule when you plan or create a business event.

Structure

You can define a schedule model in various ways:

- You can create a *schedule model with pattern*. To do this, you must first complete the step Define time schedule [Extern] in Customizing for *Training and Event Management* under *Business Event Preparation.*

  A time schedule consists of:

  – *A day number*

  – One or more *day schedules*

  – *A time block* (consisting of a maximum of three time intervals) *per day schedule*

  The system automatically calculates the total event duration in both days and hours.

- You can create a *schedule without a pattern*. In this case, you must enter the (total) *duration in days* and the (total) *duration in hours* yourself.

  When you plan or create a business event, *a generalized schedule* is generated from a schedule model created *without a pattern*.

- You can create a *user-defined schedule*. In this case, you enter the day number and select a time block.
- You can specify whether the business event should consist of *one date* or *several dates. Several dates* means that the schedule recurs multiple times at specified intervals.
- You can select a *start day*, that is, a particular day of the week as the start day. Otherwise, the start day is *undefined*.

You can use subtypes to divide the schedule model into different schedule models.

The following subtypes have already been set up in the standard system:

Subtype 0001: *main schedule*

Subtyp 0002: *alternative schedule*

Subtype 0003: *temporary schedule*

In Customizing, you can set up further schedule models as subtypes.

Infotype maintenance

You append this infotype to business event types when you create or change an event type in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create Business Event Type.*

Demand (Infotype 1060)

Definition

The *Demand* infotype stores information on the number of business events of a particular type that is required in a specific time period.

Validity specifications

The following specifications apply to the validity of infotype records:

- The validity period of an infotype record should span a whole year where possible.
- The year in the end date must be the same as the year in the start date.
- The start date proposed by the system for the infotype record is the same as the validity start date of the business event type. The end date is automatically defaulted to the last day of the same year. You may overwrite both dates.
  If you intend to create the *Demand* infotype for a business event type, it makes sense to define 01/01 as its validity start date. This way, you ensure that the validity of the infotype record spans a whole year.

  If the validity start date you specify is not 01/01 of the year, a warning is displayed. You may ignore the warning.
- To ensure data consistency, it is not possible to create a record whose validity period overlaps the validity period of an existing record.

Use

The *Demand* infotype is used in conjunction with the *planning* function. The report business event demand [Extern] lists the demand that exists for selected business event types, sorted by language and by location.

Structure

You can create demand per **quarter**, per **location**, and per **language**.

Integration

You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create Business Event Type.* Alternatively, you can create demand when you carry out business event planning in the *Planning Menu*.

You have the option of creating the *Demand* infotype or determining what demand there is for events when you plan business events in the *Planning* menu.

See also:

Demand Determination [Extern]