

# Human Resources (HR)



ADDON.IDESHR

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## Icons

| Icon  | Meaning        |
|---|----------------|
|  | Caution        |
|  | Example        |
|  | Note           |
|  | Recommendation |
|  | Syntax         |

## Typographic Conventions

| Type Style          | Description  |
|---------------------|--|
| <i>Example text</i> | Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options.<br><br>Cross-references to other documentation                                  |
| <b>Example text</b> | Emphasized words or phrases in body text, titles of graphics and tables  |
| EXAMPLE TEXT        | Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE. |
| Example text        | Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, source code as well as names of installation, upgrade and database tools.                                  |
| <b>Example text</b> | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.  |
| <Example text>      | Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.   |
| EXAMPLE TEXT        | Keys on the keyboard, for example, function keys (such as F2) or the ENTER key   |

## Contents

|  |          |
|--|----------|
| <b>Human Resources (HR)</b> .....  | <b>8</b> |
| Payroll and Subsequent Programs .....  | 9        |
| Additional Process Information .....   | 10       |
| Data Used During This Process.....   | 11       |
| Displaying and Maintaining Information Types Relevant to Payroll.....                      | 12       |
| Executing a Payroll Run .....  | 15       |
| Checking the Payroll Results.....  | 17       |
| Correcting the Payroll Results.....  | 19       |
| Displaying the Remuneration Statement .....  | 20       |
| Creating the Remuneration Statement.....   | 21       |
| Ending Payroll .....   | 22       |
| Transferring the Payroll Results to FI/CO.....   | 23       |
| Entering Travel Expenses with the Travel Calendar .....                                    | 25       |
| Data Used During This Process.....   | 26       |
| Recording a One-Day Domestic Trip with the Travel Calendar.....                            | 27       |
| Settling a Trip .....  | 29       |
| Transferring Travel Expense Results for Payment via DME.....                               | 30       |
| Printing Individual Statements for Employees.....  | 31       |
| Single Record Entry of Trip Costs and Transfer of Trip Costs .....                         | 32       |
| Additional Process Information.....  | 33       |
| Data Used During This Process.....   | 34       |
| Recording a Several-Day Domestic Trip with Receipt Entry and Simultaneously Approval ..... | 36       |
| Accounting a Trip.....   | 40       |
| Transferring Trip Costs Results to Payroll Accounting.....                                 | 41       |
| Complete Process of Trip Costs Accounting.....   | 42       |
| Data Used During This Process.....   | 43       |
| Recording an Advance Application.....  | 45       |
| Transferring an Advance to Financial Accounting.....                                       | 46       |
| Recording Remaining Trip Data for This Advance .....                                       | 47       |
| Trip Approval with the Approval Tool .....   | 49       |
| Accounting a Trip.....   | 50       |
| Transfer of Accounting Results to Financial Accounting.....                                | 52       |
| Adding a Receipt to a Posted Trip.....   | 53       |
| Renewed Approval with Correction Display.....  | 54       |
| Renewed Trip Accounting .....  | 55       |
| Posting the Difference Amount to Financial Accounting .....                                | 57       |
| Absence Approval/Rejection.....  | 58       |
| Data Used During This Process.....   | 59       |
| Entering a Leave Request .....   | 60       |
| Approving a Leave Request.....   | 61       |
| Unlocking a Leave Request.....   | 62       |

|  |     |
|--|-----|
| Checking the Status of a Leave Request.....                            | 63  |
| Rejecting a Leave Request.....   | 64  |
| Human Resources Information System .....                               | 67  |
| Data Used During This Process.....                                     | 68  |
| Calling up the Human Resources Information System .....                | 69  |
| Personnel Development .....  | 72  |
| Additional Process Information.....                                    | 73  |
| Data Used During This Process.....                                     | 74  |
| Displaying a Profile .....   | 75  |
| Performing Career Planning for Persons .....                           | 76  |
| Displaying Profile Matchups and Booking Qualification Measures.....    | 78  |
| Performing Succession Planning for Positions.....                      | 80  |
| Searching for Persons with Specific Qualifications .....               | 82  |
| Personnel Development from Organizational Unit's Point of View .....   | 83  |
| Appendix .....   | 84  |
| Figure 1.....  | 85  |
| Figure 2.....  | 86  |
| Figure 3.....  | 87  |
| Figure 4.....  | 88  |
| Figure 5.....  | 89  |
| Figure 6.....  | 90  |
| Personnel Cost Planning.....   | 91  |
| Data Used During This Process.....                                     | 92  |
| Planning Pers. Costs in HR for Current Year Using Projected Pay .....  | 94  |
| Resuming Planning that has been Completed.....                         | 98  |
| Planning Personnel Costs Using Basic Pay.....                          | 99  |
| Planning Personnel Costs Using Payroll Results .....                   | 101 |
| Releasing a Plan Scenario for Budget Planning.....                     | 103 |
| Transferring Planned Personnel Costs to Budget Planning .....          | 104 |
| Displaying Planned Pers. Costs for Curr. Year in Cost Accounting.....  | 105 |
| Individual Incentive Wages .....                                       | 106 |
| Hiring Incentive Wage Earners .....                                    | 107 |
| Data Used During This Process.....                                     | 108 |
| Determining the Premium Formula for the Period.....                    | 110 |
| Entering Time Tickets .....  | 111 |
| Cumulations and Results in Individual Incentive Wages.....             | 113 |
| Time Tickets in Payroll .....  | 115 |
| Additional Process Information.....                                    | 116 |
| Data Used During This Process.....                                     | 117 |
| Entering Time Tickets .....  | 120 |
| Displaying the Time Tickets in the Remuneration Statement .....        | 123 |
| Displaying Subsequent Time Tickets in the Remuneration Statement ..... | 124 |
| Reassignment to Wage Group and Wage Level.....                         | 125 |
| Data Used During This Process.....                                     | 126 |
| Displaying Personal work schedule.....                                 | 128 |

|   |     |
|---|-----|
| Entering Time-Based and Premium Time Tickets .....                                      | 129 |
| Payroll Accounting.....   | 132 |
| Reassigning Incentive Wage Earners and Time Wage Earners to Different Wage Groups ..... | 133 |
| Reassigning Incentive Wage Earners to a Different Wage Level .....                      | 135 |
| Workflow for Travel Management.....   | 137 |
| Introduction.....   | 138 |
| Data Used During This Process.....  | 139 |
| Entering a Travel Request.....  | 140 |
| Approving a Travel Request.....   | 142 |
| Displaying the Approval Notification for the Employee.....                              | 143 |
| Entering Trip Facts.....  | 144 |
| Checking the Trip Facts.....  | 146 |
| Approving a Business Trip.....  | 147 |
| Settling a Trip .....   | 148 |
| Typical Work Process in Time Management .....   | 149 |
| Additional Process Information .....  | 150 |
| Data Used During This Process.....  | 151 |
| Displaying the Work Schedule and Checking Time Events.....                              | 152 |
| Displaying Time Events .....  | 154 |
| Running Time Evaluation .....   | 156 |
| Using Integrated Error Handling.....  | 157 |
| Recruitment via Internet .....  | 159 |
| Additional Process Information.....   | 160 |
| Data Used During This Process.....  | 161 |
| Displaying Employment Opportunities in the Internet.....                                | 163 |
| Viewing Applicant Data.....   | 166 |
| Application Status in the Internet.....   | 167 |
| Data Used During This Process.....  | 168 |
| Checking the Application Status Using the Internet .....                                | 169 |
| Editing the Application Status .....  | 170 |
| Calendar of Events (Web User).....  | 171 |
| Data Used During This Process.....  | 172 |
| Displaying the Calendar of Events .....   | 173 |
| Booked Events .....   | 175 |
| Data Used During This Process.....  | 176 |
| Displaying Booked Events .....  | 177 |
| Attendance Cancellation .....   | 178 |
| Data Used During This Process.....  | 179 |
| Canceling Attendance.....   | 180 |



## Human Resources (HR)

### Personnel Administration

[Entering Travel Expenses with the Travel Calendar \[Page 25\]](#)

[Single Record Entry of Trip Costs and Transfer of Trip Costs \[Page 32\]](#)

[Complete Process of Trip Costs Accounting \[Page 42\]](#)

[Payroll Accounting and Subsequent Programs \[Page 9\]](#)

[Absence Approval/Rejection \[Page 58\]](#)

### Personnel Planning

[Human Resources Information System \[Page 67\]](#)

[Personnel Development \[Page 72\]](#)

[Personnel Cost Planning \[Page 91\]](#)

### Incentive Wages

[Individual Incentive Wages \[Page 106\]](#)

[Time Tickets in Payroll \[Page 115\]](#)

[Reassignment to Wage Group and Wage Level \[Page 125\]](#)

### Workflow

[Workflow for Travel Management \[Page 137\]](#)

### Time Management

[Typical Work Process in Time Management \[Page 149\]](#)

### Internet Scenarios

[Recruitment via Internet \[Page 159\]](#)

[Application Status in the Internet \[Page 167\]](#)

[Calendar of Events \(Web User\) \[Page 171\]](#)

[Booked Events \[Page 175\]](#)

[Attendance Cancelling \[Page 178\]](#)



## Payroll and Subsequent Programs

### Purpose

The process represents all steps in payroll. Moreover, all subsequent actions connected with payroll should be carried out. The process should start by examining the employee's master data to determine the remuneration. The interaction of the individual infotypes is clarified by analyzing the payroll results and account transactions in Financial Accounting.

You can find more information about this process under [i](#) [Page 10].

### Process Flow

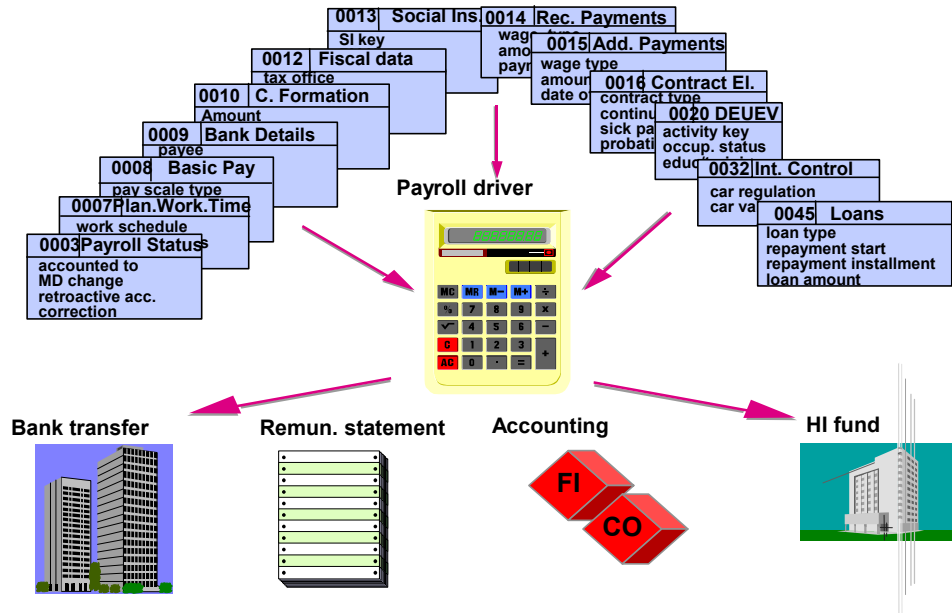
You can find the data for this process under [?](#) [Page 11].

1. [Displaying and Maintaining Information Types Relevant to Payroll \[Page 12\]](#)
2. [Executing a Payroll Run \[Page 15\]](#)
3. [Checking the Payroll Results \[Page 17\]](#)
4. [Correcting the Payroll Results \[Page 19\]](#)
5. [Displaying the Remuneration Statement \[Page 20\]](#)
6. [Creating the Remuneration Statement \[Page 21\]](#)
7. [Ending Payroll \[Page 22\]](#)
8. [Transferring the Payroll Results to FI/CO \[Page 23\]](#)

Additional Process Information

## Additional Process Information

The master data represented in the graphic is processed during payroll along with additional time management information. The data is then transferred to different target groups.



## Data Used During This Process

| Field            | Data   | Description              |
|------------------|--------|--------------------------|
| Personnel number | 1051   | Barbara Fischer          |
| Information type | 0001   | Org. assignment          |
| Information type | 0008   | Basic pay                |
| Information type | 0015   | Additional payments      |
| Information type | 0027   | Cost distribution        |
| Payroll area     | D2     | HR-D: Salaried employees |
| Current period   | Select |                          |
| Payroll schema   | D000   |                          |

## Displaying and Maintaining Information Types Relevant to Payroll



# Displaying and Maintaining Information Types Relevant to Payroll

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Administration → HR Master Data → Display</i> |
| <b>Transaction Code</b> | PA20  |

2. You make the following entries on the *Display HR Master Data* screen:

| Field            | Data |
|------------------|------|
| Personnel number | 1051 |

3. Choose .
4. Select the *Organizational Assignment* information type on the *Basic Personal Data* tab page.
5. Choose .

The *Display Organizational Assignment* screen appears.

All the employee's important assignment features are displayed here. The following data is relevant for payroll:

- *Company Code*: defines a unit for which a self-contained set of accounts can be drawn up.
- *Personnel Area*: delimits organizational areas according to human resources criteria.
- *Cost ctr Center*: defines the location where costs are incurred.
- *Business Area*: delimits organizational areas according to financial accounting criteria.
- *Employee Group*: uses personnel provisions, mainly to differentiate between active and inactive employees.
- *Employee Subgroup*: an additional organizational feature used to differentiate within an employee group, for example, between salaried employees and employees receiving wages.
- *Payroll Area*: employees included in a payroll run for a period are grouped together in a payroll area.

6. Choose *Org Structure*.

The *Organizational Assignment* dialog box appears.

You see the person, the organizational unit, the position and the respective job.

7. Choose *Organizational Unit*.

8. Choose .

The *Staff Assignments / Display* screen is displayed.

You see the customers and the respective positions and employees.

9. Choose  until the *Display Organizational Assignment* screen appears.

10. In the dialog box, choose .

**Displaying and Maintaining Information Types Relevant to Payroll**

11. Choose  until the *Display HR Master Data* screen appears.

12. Choose the *Gross/Net Payroll* tab page.

13. Select the *Basic Pay* information type.

14. Choose .

The *Display Basic Pay* screen is displayed.

Here you obtain the following information:

- *Rate*: Pay scale type and pay scale area for the location, as well as the pay scale group and pay scale level for the employee.
- *Capacity Utilization Level*: Determines the percentage of the employee's working time in relation to the working time defined in the collective agreement.
- *Wage Types*: The actual basic pay for the employee. In this example, the employee's standard pay is determined "indirectly". This means that the system determines the salary level based on the employee's assignment to a wage level.

15. Choose  until the *Display HR Master Data* screen appears.

16. Choose *HR Master Data* → *Maintain*.

The *Maintain HR Master Data* screen is displayed.

17. Enter the following data:

| Field            | Data                 |
|------------------|----------------------|
| Personnel number | 1051                 |
| Period           | Select current month |

18. Select the *Additional Payments* information type.

19. Choose .

The *Create Additional Payments* screen is displayed.

20. Enter the following data:

| Field     | Data   |
|-----------|--------|
| Wage type | M140   |
| Amount    | 555.00 |

21. Choose .

The *Cost Assignment Defaults* dialog box appears.

You can assign the additional payments to another cost center. Note that the amount of the wage type will be charged to the new cost center. In this example, the cost of the special payment should be charged to the personnel department.

22. Enter the following data:


| Field         | Data |
|---------------|------|
| Business area | 9900 |

### Displaying and Maintaining Information Types Relevant to Payroll

|             |                             |
|-------------|-----------------------------|
| Cost center | 2200 (personnel department) |
|-------------|-----------------------------|

23. Choose *Transfer*.


The *Create Additional Payments* screen is displayed.

24. Choose .

If a warning about the payroll past is displayed, choose *Enter*.

You can see that the employee received additional payments in the current period (green check mark).

25. Select the *Cost Distribution* information type.

26. Choose .


The *Create Cost Distribution* screen is displayed.


27. Enter the following data:

| Field        | Data                 |
|--------------|----------------------|
| Valid        | 1st of payroll month |
| Distribution | 01                   |


28. Enter the following data as well:

| No | CoCd | Cost ctr                | Prcnt. |
|----|------|-------------------------|--------|
| 01 | 1000 | 1000 (Corp. Service)    | 10     |
| 02 | 1000 | 2100 (Finance & Admin.) | 80     |
| 03 | 1000 | 2300 (Purchasing)       | 10     |

29. Choose .

If a warning message is displayed, choose .

30. Choose .

31. Choose  until the overview tree appears.

## Executing a Payroll Run


### Prerequisite

You must release a payroll run before you execute it. Then the payroll run can take place.

### Procedure

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Payroll → Europe → Germany → Payroll → Release Payroll</i> |
| <b>Transaction Code</b> | PC00_M99_PA03_RELEA   |

2. Enter *D2* in the dialog box beside *Payroll area*, and choose .
3. Choose Yes in the dialog box that appears.

The overview tree appears again.



4. Call up the transaction as follows:

|                         |                             |
|-------------------------|-----------------------------|
| <b>Menu Path</b>        | Select <i>Start Payroll</i> |
| <b>Transaction Code</b> | PC00_M01_CALC               |

The *Payroll Program – Germany* screen is displayed.

5. Enter the following data:

| Field                         | Data |
|-------------------------------|------|
| Payroll period – Payroll area | D2   |
| Selection - Personnel number  | 1051 |
| Selection - Payroll area      | D2   |

6. Choose .
7. Choose .

A message is displayed in the status line stating that the payroll is running.


The *Display Log Tree* screen is displayed.


The payroll log is displayed here.

8. Check the following entries:

| Field                                       | Data |
|---|------|
| Selected personnel numbers                  | 1    |
| Successful                                  | 1    |
| Number of periods                           | 1    |
| Rejected                                    | 0    |
| Total number of messages and error messages | 0    |

### Executing a Payroll Run

9. Choose  until the overview tree appears.

Choose  Yes on the dialog box that appears.



## Checking the Payroll Results



1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | Under the node <i>Germany</i> choose <i>Tools</i> → <i>Display Results</i> |
| <b>Transaction Code</b> | PC_PAYRESULT   |


The *Display Payroll Results* screen is displayed.

2. Enter the following data:

| Field            | Data                           |
|------------------|--------------------------------|
| Personnel number | 1051                           |
| all results from | 1. of the payroll month / year |

3. Choose .
4. Mark the line with the current payroll result.
5. Choose .



The list of payroll tables is displayed.

6. Use the *Ctrl* button to mark the following tables: *WPBP* (*Work Center/Basic Pay*), *RT* (*Results Table*), *CO* (*Cost Distribution*) and *C1* (*Cost Distribution from Various Infotypes*).
7. Choose .

The list that appears contains a representative cross-section of the payroll database:

- *WPBP*: Contains all payroll-relevant values from master data, for example, company code, cost center, pay scale feature. These are displayed in a shortened form.
  - *RT*: Contains all wage types and amounts.
  - *C0, C1*: Contain information on the cost distribution.
8. Choose *System* → *List* → *Find*.
  9. Enter the following data in the dialog box:


| Field                    | Data      |
|--------------------------|-----------|
| Find                     | M140      |
| Starting at current line | De-select |
| Only on current page     | De-select |

10. Choose .
11. In the dialog box choose the line *M140*.
12. Choose  *Position cursor*.

You now see the wage type, the name and the respective amount. You can also see the value 0001 under the title *CA* (*Cost Accounting*).

You can now see tables *C0* and *C1*. Note the cost assignment in both tables. You can see that cost center 2200 has been debited after the assignment 0001 in table *C1*.

### Checking the Payroll Results

13. Choose  until the overview tree appears.

## Correcting the Payroll Results

### Use

When checking the payroll results you discovered that the person with the personnel number 1051 didn't receive enough remuneration for additional payments. You now want to correct this error in the current payroll period.

### Procedure


1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Administration → HR Master Data → Maintain</i> |
| <b>Transaction Code</b> | PA30   |

2. You make the following entries on the *Maintain HR Master Data* screen:

| Field            | Data |
|------------------|------|
| Personnel number | 1051 |

3. Mark the information type *Additional Payments* on the *Gross/Net Payroll* tab page.

4. Choose .


The *Change Additional Payments* screen is displayed.

5. Enter the following data:

| Field          | Data                          |
|----------------|-------------------------------|
| Wage type      | M140                          |
| Amount         | 666,00                        |
| Date of origin | In the current payroll period |

6. Choose  and .

If a warning message is displayed, confirm it.

7. Choose  until the overview tree appears.

## Displaying the Remuneration Statement

# Displaying the Remuneration Statement

## Procedure




1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu path</b>        | Under the node <i>Germany</i> select <i>Payroll</i> → <i>Start Payroll</i> |
| <b>Transaction code</b> | PC00_M01_CALC  |

The *Payroll Program – Germany* screen is displayed.

2. Enter the following data:



| Field                           | Data   |
|---------------------------------|--------|
| Payroll period – Payroll area   | D2     |
| Payroll period – Current period | Select |
| Selection - Personnel number    | 1051   |
| Selection - Payroll area        | D2     |

3. In the *Remuneration Statement Parameters* section, select F4 help for the *Display Variant Remuneration Statement* field.
4. In the dialog box that appears choose *SAP&CALC* and .
5. Choose  and .

The remuneration statement is displayed.



The payroll now exists in its correct form. If necessary, you can check the results using the procedure described in the section entitled *Checking the Payroll Results*.

6. Choose  until the overview tree appears.  
Choose  Yes on the dialog box that appears.

## Creating the Remuneration Statement

### Use

The remuneration statement refers to the payslip which the employee receives periodically.



You do not have to carry out this process step. If you do not have a printer set up or do not want to print, then continue with the step *Ending Payroll*.

### Procedure


1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Payroll → Europe → Germany → Payroll → Remuneration Statement</i> |
| <b>Transaction Code</b> | PC00_M01_CEDT  |

The *Remuneration Statements* screen is displayed.

2. Enter the following data:

| Field            | Data   |
|------------------|--------|
| Payroll area     | D2     |
| Current period   | Select |
| Personnel number | 1051   |

3. Choose .


The completed form for the remuneration statement is displayed.

4. Choose *List → Print*.

5. Enter the following data:

| Field                             | Data                     |
|-----------------------------------|--------------------------|
| Printer                           | The name of your printer |
| Number of copies                  | 1                        |
| Number of pages – Print all       | Select                   |
| Spool options – Print immediately | Select                   |

6. Choose *Continue*.

7. Choose  until the overview tree appears.

---

**Ending Payroll**

## Ending Payroll

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Payroll → Europe → Germany → Payroll → Exit Payroll</i> |
| <b>Transaction Code</b> | PC00_M99_PA03_END  |

2. In the dialog box, choose .

Payroll has now been ended for the current period of the payroll run. You can only make corrections for this period by carrying out retroactive accounting in the subsequent period.

An overview tree appears again.

## Transferring the Payroll Results to FI/CO

### Use

Values must be transferred from payroll to FI/CO for book-keeping purposes and for evaluating personnel costs.

This happens in two stages:

**Preparation for Evaluation:** Certain wage types are read from the payroll database and are saved in a work file.

**Transfer:** The work file is evaluated and a batch input file is created for transaction FB01 (posting document).

### Procedure

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Payroll → Europe → Germany → Subsequent Activities → Per Payroll Period → Reporting → Posting to Accounting → Create Posting Run</i> |
| <b>Transaction Code</b> | PC00_M99_CIPE   |

The *Posting to Accounting: Create Posting Run* screen is displayed.

2. Enter the following data:

| Field                                      | Data                                 |
|--|--------------------------------------|
| Payroll period – Payroll area              | D2                                   |
| Payroll period – Current period            | Select                               |
| Selection - Personnel number               | 1051                                 |
| Selection - Payroll area                   | D2                                   |
| Run attributes – Type of document creation | S (Creation of simulation documents) |

3. Choose  and .

The log of the posting run is displayed.



The following data is important in the log tree:

| Field                | Data       |
|----------------------|------------|
| Posting run no. (PP) | XXX        |
| Doc. creation        | Error-free |

4. Choose *Document overview*.

The *Posting to Accounting: Document Overview* screen is displayed.

The posting document that has been created is displayed in this screen.

**Transferring the Payroll Results to FI/CO**

5. In the column entitled *Document*, double-click the posting number.

The posting document is displayed in a tabular form.



You obtain an overview of all the posting-relevant data. The listed G/L accounts and the CO account assignments are of particular importance. If the posting document is created without errors the debit and credit amounts should be the same.

6. In the column *Account Number with Text* double-click the item *176000 (Salaries and wages payable)*.

The *Display Revision Information for Posting Document* screen is displayed.

7. Double-click once again the account *176000* with *Personnel number 1051*.

The *Display Payroll Result and Posted Amounts* screen is displayed.

All the posted wage types are displayed in a more detailed view.


The wage type */559 Bank Transfer* is highlighted in green and is posted to credit.

8. Choose  until you return to the posting document.

9. Double-click the G/L account *430000 Salaries* with the *CO account assignment Cctr 2100*.

The *Display Revision Information for Posting Document* screen is displayed.

Here you can trace the posting of the expense account in detail.


10. Choose  until you return to the *Posting to Accounting: Document Overview* screen.

11. Choose  to release the document.

In the status line a message appears stating that the document cannot be posted.



It is only possible to release documents in a live payroll run.

12. Choose  until the overview tree appears.



## Entering Travel Expenses with the Travel Calendar

It is easy to enter one or more domestic trips for one personnel number with the travel calendar. This process is intended to demonstrate how a simple trip can be recorded using the travel calendar, how the travel expenses can be settled in the SAP R/3 System, and how the employee obtains a statement of his or her travel expenses.



The example shown here only refers to German travel expenses. All per diems/flat rates are calculated in accordance with German travel expense laws.

### Process Flow

You can find the data for this process under [?](#) [Page 26].

1. [Recording a One-Day Domestic Trip with the Travel Calendar \[Page 27\]](#)
2. [Settling a Trip \[Page 29\]](#)
3. [Transferring Travel Expense Results for Payment via DME \[Page 30\]](#)
4. [Printing Individual Statements for Employees \[Page 31\]](#)

## Data Used During This Process

**Data Used During This Process**

| Field                            | Data                   |
|----------------------------------|------------------------|
| Personnel number                 | 1000                   |
| Interval from                    | Start of current month |
| Interval to                      | End of current month   |
| 03. 3rd day in month/from        | 08:00                  |
| 03. 3rd day in month/to          | 18:45                  |
| 03. 3rd day in month/reason      | Trade fair             |
| 03. 3rd day in month/location    | Southampton            |
| 03. 3rd day in month/miles or km | 210                    |
| 3rd day in month/M               | Select                 |
| 03. 3rd day in month/B           | Deselect               |
| 03. 3rd day in month/L           | Select                 |
| 03. 3rd day in month/D           | Deselect               |
| Amount                           | 13,00                  |
| Payroll area                     | D2                     |
| Other period                     | Selected month/year    |
| Period                           | Current month          |
| Personnel number to              | 1000                   |
| Determine house bank with        | DTAKT                  |
| Statement wage type              | /599                   |
| Test run                         | Select                 |
| Control list                     | Select                 |
| “Umlaut” conversion              | Select                 |
| Repeat printed trips?            | Deselect               |
| Test printout                    | Deselect               |
| Print travel request             | Deselect               |
| Printer                          | Enter your printer     |
| Number of copies                 | 1                      |


Recording a One-Day Domestic Trip with the Travel Calendar

## Recording a One-Day Domestic Trip with the Travel Calendar

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Travel Calendar</i> |
| <b>Transaction Code</b> | PR02   |

The system displays the *Travel Calendar: Domestic Trips* screen.

2. Enter 1000 in the *Personnel number* field.
3. Choose .
4. On the *Travel Calendar: Domestic Trips* screen, in the line for the first workday of the current month, enter the following data:

| Field    | Data        |
|----------|-------------|
| From     | 08:00       |
| to       | 18:45       |
| Reason   | Trade fair  |
| Location | Southampton |
| Miles/km | 210         |
| P        | Select      |
| B        | Deselect    |
| L        | Select      |
| D        | Deselect    |

5. Choose .


The remaining fields are filled with the default values.



You have recorded a trip for an employee on the first working day of the current month from 8:00 AM to 6:45 PM to Southampton. This employee drove 210 km with his/her own car (Miles/km field), the meals are accounted by per diem (*P* field), and he/she was invited to lunch by the customer (*L* field = deduction due to gratuitous entertainment for lunch, *B* and *D* analogous). The *Nt* field (number of per diems for accommodation nights) cannot be filled in this case, since the trip only lasted 1 day. The *S* field refers to statutory trip types. The *E* field describes the company's trip type. The *A* field stands for trip activity. The *Status* field, finally, is used to indicate the status of the specified trip. For further information, you can place your cursor on the relevant field and press F1 for field help.

6. Select the trip.


**Recording a One-Day Domestic Trip with the Travel Calendar**

7. Choose  *Receipts*.
8. On the *Trip Data Maintn: Receipts* screen, go to the *Trip expense type* field in the first line, and select possible entries.

The system displays a selection list of all expense types that can be chosen here.


9. Select the value *Park* (parking), for example, by double-clicking it.
10. Enter the following data in this line:

| Field    | Data  |
|----------|-------|
| Amount   | 13.00 |
| Currency | DEM   |


11. Choose .



You have now recorded a parking receipt from the first of the current month and amounting to 13.00 DEM. This receipt includes 16% value added tax (VAT field).


12. Choose .

The system displays the *Travel Calendar: Domestic Trips* screen.

13. Choose .



By saving the trips in the travel calendar, you also simultaneously approve them. As you will see later in other process chains in Trip Costs Accounting, this is, for organizational reasons, not always an advantage (for example, when using Workflow for accounting of trip costs).


14. Choose  until the overview tree appears.

## Settling a Trip

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Travel Expense Manager</i> |
| <b>Transaction code</b> | PR05  |


The system displays the *Travel Expense Manager* screen.

2. Select the trip that you want to settle.
3. Choose  *Settle*.

The *Enter settlement period* dialog box appears.

4. Enter the following data:


| Field                       | Data          |
|-----------------------------|---------------|
| Settlement period – Field 1 | D2            |
| Settlement period – Field 2 | Current month |
| Settlement period – Field 3 | Current year  |

5. To start the settlement, choose  in the dialog box.

The status of the trip is thus changed from *To be settled* to *Settled* and payment for the trip can be carried out.



In the example, only one trip was settled. It is possible to settle several trips in a period. To do this, you would select all of them.

6. Choose  until the overview tree appears.



## Transferring Travel Expense Results for Payment via DME

## Transferring Travel Expense Results for Payment via DME

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic Processing → Payment via Data Medium Exchange (DME) → Pre.Program DME</i> |
| <b>Transaction code</b> | PRDX  |

The *Country grouping* dialog box appears.

2. Choose  and Germany.
3. Choose .


The system displays the *Data medium exchange: Travel Expenses (Germany)* screen.

4. Enter the following data:

| Field                    | Data   |
|--------------------------|--------|
| Period - Current month   | Select |
| Personnel number         | 1000   |
| Determine house bank via | DTAKT  |
| Statement wage type      | /559   |
| Test run                 | Select |
| Check list               | Select |
| Convert "umlauts"        | Select |

5. To start the DME preliminary program, select .

This changes the status of the trip from *settled* to *paid via DME*. The amounts for the trip are exported to the data carrier in the next DME run.

6. Choose  until the overview tree appears.

## Printing Individual Statements for Employees


1. Call up the transaction as follows:


|                         |  |
|-------------------------|--|
| <b>Menu path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic Processing → Print Forms → Standard Form</i> |
| <b>Transaction code</b> | PRF0   |

The system displays the *Standard Travel Expense Form* screen.

2. Enter the following data:

| Field                 | Data     |
|-----------------------|----------|
| Payroll area          | D2       |
| Current period        | Select   |
| Personnel number      | 1000     |
| Repeat printed trips? | Deselect |
| Test printout         | Deselect |
| Print travel request  | Deselect |
| Cost assignment       | Select   |



3. To display a preview of the printout, choose .

4. To print, choose .

If the system tells you that a spool request was created, this means that your document was placed in a list for output later on the default printer. If this is the case, skip points four and five.

5. You make the following entries on the *Print Screen List* screen:

| Field            | Data               |
|------------------|--------------------|
| Printer          | Enter your printer |
| Number of copies | 1                  |

6. To start the printout, select .
7. Confirm the information in the dialog box.
8. Choose  until the overview tree appears.

---

**Single Record Entry of Trip Costs and Transfer of Trip Costs**

## Single Record Entry of Trip Costs and Transfer of Trip Costs

### Purpose

Receipt entry lets you quickly record trips which only involve flat rates for miles/kilometers and receipts. All of this data can be entered in a single screen. This saves you from navigating between screens. You can, however, still enter additional data, such as deductions due to gratuitous entertainment or stopovers, in the respective screens. This process describes how you can enter a domestic trip lasting several days with receipts and two stopovers. The results of trip costs accounting are transferred to payroll directly for payment through payroll.

You can find more information about this process [i](#) [Page 33].

### Process Flow

You can find the data for this process under [?](#) [Page 34].

1. [Recording a Several-day Domestic Trip with Receipt Entry and Simultaneous Approval](#) [Page 36]
2. [Accounting a Trip](#) [Page 40]
3. [Transferring Trip Costs Results to Payroll Accounting](#) [Page 41]



## Additional Process Information

The example used here only refers to German travel expense accounting; in other words, all per diems/flat rates are calculated according to German travel expenses laws.

To pay trip expenses to the employee as a part of payroll, the function DREI (for Germany) must be active in schema D000. For more details, see the system documentation.

A prerequisite for recording an employee's trips is the maintenance of the employee's travel privileges in infotype 0017.

## Data Used During This Process

**Data Used During This Process**

| Field              | Data                        |
|--------------------|-----------------------------|
| Personnel number   | 1000 (Anja Müller)          |
| From (date, time)  | 10th of current month 9:45  |
| End (date, time)   | 14th of current month 19:25 |
| Reason             | Visit to customer           |
| City               | Hamburg                     |
| Country            | DE                          |
| Region             | No entry                    |
| MI                 | 65                          |
| 001 / Expense type | HOTL                        |
| 001 / Amount       | 845.00                      |
| 001 / Date         | 14th of current month       |
| 001 / Text         | Holi_Inn                    |
| 001 / NB           | 4                           |
| 001 / BC           | DE                          |
| 002 / Expense type | PARK                        |
| 002 / Amount       | 65                          |
| 002 / Date         | 14th of current month       |
| 002 / Text         | Train station               |
| 003 / Expense type | TELE                        |
| 003 / Amount       | 12                          |
| 003 / VT           | V1                          |
| 003 / Date         | 10th of current month       |
| 003 / Text         | Telecard                    |
| 004 / Expense type | TAXI                        |
| 004 / Amount       | 28.50                       |
| 004 / Date         | 10th of current month       |
| 005 / Expense type | BABZ                        |
| 005 / Amount       | 285                         |
| 005 / Date         | 10th of current month       |
| 005 / Text         | ICE MA-HH                   |

Data Used During This Process

|                              |                             |
|------------------------------|-----------------------------|
| Destinations / 1 / from      | 11th of current month 9:00  |
| Destinations / 1 / to        | 11th of current month 21:00 |
| Destinations / 1 / reason    | Werft AG                    |
| Destinations/ 1 / loc.       | Kiel                        |
| Destinations / 2 / from      | 13th of current month 11:00 |
| Destinations / 2 / to        | 13th of current month 21:30 |
| Destinations/ 2 / reason     | Kleinfeld GmbH              |
| Destinations/ 2 / loc.       | Bremen                      |
| Payroll area                 | D2                          |
| other period                 | Select month/year           |
| Accounting/ Personnel number | 1000                        |
| Master cost center           | 2200                        |
| Other cost center            | 2100                        |

## Recording a Several-Day Domestic Trip with Receipt Entry and Simultaneously Approval

## Recording a Several-Day Domestic Trip with Receipt Entry and Simultaneously Approval


1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources</i> → <i>Travel Management</i> → <i>Travel Expenses</i> → <i>Travel Expense Manager</i> |
| <b>Transaction Code</b> | PR05   |

2. Enter the personnel number 1000.

3. Choose .

4. Choose .

Choose  in the dialog box.

5. On the *Anja Müller, PersNo. 1000, Trip no.* screen, enter the following data:


| Field             | Data                           |
|-------------------|--------------------------------|
| From (date, time) | 1, Monday of curr. month 9:45  |
| Reason            | Visit to customer              |
| End (date, time)  | 1. Friday of curr. month 19:25 |
| City              | Hamburg                        |
| Country           | DE                             |
| Region            | No entry                       |
| MI                | 65                             |

6. Choose .

7. Choose the *Advances* tab page.

8. Enter the following data:


| Field             | Data                             |
|-------------------|----------------------------------|
| Amount            | 500                              |
| Currency          | DEM                              |
| Ex. rate          | no entry                         |
| Settlement amount | no entry                         |
| Ca Off            | Select                           |
| Date              | Last working day before the trip |

9. Choose .





The R/3 System defaults the fields where you have made no entries.

**Recording a Several-Day Domestic Trip with Receipt Entry and Simultaneously Approval**

10. Choose the *Receipts* tab page.
11. Select the ExpTy field in the first row (RNo 001) and use the F4 input help.
12. In the *Trip Expense Type* dialog box, choose the trip expense type *BABZ (train paid)*.
13. Choose .
14. Enter the following data in the first receipt row:

| ExpTy | Amount | Currency | Date                     |
|-------|--------|----------|--------------------------|
| BABZ  | 285.00 | DEM      | 1. Monday of curr. month |



It is easier to make all of the entries in the system first and then to choose , than to choose  after each individual entry. This can accelerate the recording of trip facts considerably, since the required checks are performed after completing recording and not after each entry.

This last receipt is a so-called paid receipt, this means that the receipt was paid by the company (for example, by the trip costs department) and, for that reason, is not reimbursed to the employee. However, in order to present a complete picture of all of the costs involved in this trip, it is entered here.

15. Select the following field *ExpTy*, choose the expense type with the corresponding matchcode and enter the following data:

| Exp Ty | Amount | Currency | Date                     |
|--------|--------|----------|--------------------------|
| TAXI   | 28.50  | DEM      | 1. Monday of curr. month |
| TELE   | 12.00  | DEM      | 1. Monday of curr. month |
| HOTL   | 845.00 | DEM      | 1. Friday of curr. month |

16. Choose .

You also have to enter additional information for the hotel receipt.

17. In the dialog box, enter the following data:

| Field                | Data                       |
|----------------------|----------------------------|
| From date            | 1. Monday of current month |
| To                   | 1. Friday of current month |
| Number of breakfasts | 4                          |
| Description          | HOLI_INN                   |
| Business purpose     | Lodging night              |
| Country              | DE                         |
| Region               | no entry                   |

18. Choose .

## Recording a Several-Day Domestic Trip with Receipt Entry and Simultaneously Approval



By carrying out these steps, you have entered a hotel receipt from the 14th of the current month. Four breakfasts were included in the hotel receipt.

The Exp Ty HOTL are now displayed as red, because you entered further information.

To see the information you have entered, double-click on the receipt.

19. Choose the *Add. dests* tab page.

20. Enter the following data:

| From                                 | Loc  | Reason   |
|--------------------------------------|------|----------|
| 1. Tuesday of the current month 9:00 | Kiel | Werft AG |

21. Choose *Create add. destination* to enter the second data.

22. Enter the following data:

| From                             | Loc    | Reason         |
|----------------------------------|--------|----------------|
| 1. Thursday of curr. month 11:00 | Bremen | Kleinfeld GmbH |

23. Choose .

24. Choose the *Receipts* tab page.



Because two days of the trip have been used for other projects, Frau Müller wants to change the cost assignment.

25. In the *alternative cost assignment for entire trip*, if other than master CA area, choose .

26. In the dialog box enter the following data:

| Field         | Data |
|---------------|------|
| Distribution  | 30   |
| Company code  | 1000 |
| Business area | 9900 |
| Cost center   | 2100 |

27. Choose .

In the dialog box, you see that 70 % of the costs are displayed on the master cost center.

28. Choose .

29. Choose *Approve*.

If the *Save* dialog box appears, choose *Yes*.

You now see that the status of the trip is *Approved* and *To be accounted*.

30. To check the trip, select the row of your trip and choose *Results*.

In the document you can see the costs and the cost distributions.

---

**Recording a Several-Day Domestic Trip with Receipt Entry and Simultaneously Approval**


31. Choose  until the *Travel Expense Manager* screen appears.

---


**Accounting a Trip**

## Accounting a Trip


1. Select the row for your trip

2. Choose  *Settle*.

A dialog box appears. The default settlement period is Mrs. Müller's payroll subunit and the current payroll period.

3. Choose .

The trip has now been billed.

4. Choose  until the overview tree appears.



Transferring Trip Costs Results to Payroll Accounting


## Transferring Trip Costs Results to Payroll Accounting


1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Payroll → Europe → Germany → Payroll → Simulation</i> |
| <b>Transaction Code</b> | PC00_M01_CALC_SIMU   |

2. On the *Payroll Program - Germany* screen, enter the following data:

| Field                           | Data                         |
|---------------------------------|------------------------------|
| Payroll area                    | D2                           |
| Other period                    | Select, current period /year |
| Personnel number                | 1000                         |
| Payroll area                    | D2                           |
| Display log                     | Deselect                     |
| Display variant remun.statement | Calc                         |

3. Choose .

4. Choose  until the overview tree appears.

---

**Complete Process of Trip Costs Accounting**

## Complete Process of Trip Costs Accounting

This process chain is meant to illustrate an example for the entire process involved in accounting the costs for a business trip: beginning with the entry of an application for an advance via the advance transaction (cash office transaction) and the subsequent transferring of the advance to financial accounting. As the next step, after the trip has been completed, the remaining trip data is recorded in the system. After that, the trip must once again be approved and accounted by a superior or by the expense department. Finally, the entire trip is transferred to financial accounting, where payment is also effected.

At the end of this process chain, an example is shown of how a receipt can be added later to the data of a trip which has already been posted and paid, and how the change can be documented via the history function. Finally, the difference amount is also posted to financial accounting.



- The example shown here only refers to German travel expense accounting; in other words, all per diems/flat rates are calculated according to German travel expenses laws.
- Transfer to and payment via financial accounting is only possible if a person-related vendor exists for the relevant employee in financial accounting. Posting of trip expenses then goes directly to this account and automatic payment is started from there. If there are additional amounts, these amounts must also be taxed via payroll accounting.
- A prerequisite for recording an employee's trips, is that this employee's Travel Privileges have been maintained in infotype 0017.

### Process Flow

You can find the data for this process under [?](#) [Page 43].

1. [Recording an Advance Application \[Page 45\]](#)
2. [Transferring an Advance to Financial Accounting \[Page 46\]](#)
3. [Recording Remaining Trip Data for This Advance \[Page 47\]](#)
4. [Trip Approval with the Approval Tool \[Page 49\]](#)
5. [Accounting a Trip \[Page 50\]](#)
6. [Transfer of Accounting Results to Financial Accounting \[Page 51\]](#)
7. [Adding a Receipt to a Posted Trip \[Page 53\]](#)
8. [Renewed Approval with Correction Display \[Page 54\]](#)
9. [Renewed Trip Accounting \[Page 55\]](#)
10. [Posting the Difference Amount to Financial Accounting \[Page 56\]](#)

## Data Used During This Process

| Field                            | Data                             |
|----------------------------------|----------------------------------|
| Personnel number                 | 1000                             |
| Advance / Amount                 | 500.00                           |
| FI /Payroll area<br>other period | D2<br>select, current month/year |
| Trip duration/ from              | 1st of curr. month<br>10:00      |
| Trip duration / to               | 9th of curr. month      17:45    |
| Reason                           | Customer, internat.              |
| Location                         | Vienna                           |
| Country                          | AT                               |
| Region                           | Vienna                           |
| Trip schema                      | 02                               |
| Meals                            | X                                |
| Miles/kms                        | 200                              |
| Domestic kms                     | 200                              |
| Domestic return                  | 9th of curr. month    17:45, IT  |
| Receipts / 001 / Expenses        | BLDR                             |
| See above / Amount               | 480                              |
| See above / Currency             | DEM                              |
| See above / Date                 | 1st of curr. month               |
| See above / Text                 | Zurich                           |
| Receipts / 002 / Expenses        | HOTL                             |
| See above / Amount               | 360                              |
| See above / Currency             | CHF                              |
| See above / Date                 | 3rd of current month             |
| See above / Text                 | Hilton,ZH                        |
| See above / NB                   | 2                                |
| See above/ BC                    | CH                               |
| For remaining receipts see....   |                                  |
| Line / 1 / of                    | 1st of curr. month    13:00      |




## Data Used During This Process

|                                      |                                  |
|--------------------------------------|----------------------------------|
| See above / to                       | 3rd of curr. month 9:30          |
| See above / Reason                   | Airport                          |
| See above / Location                 | Zurich                           |
| See above / Country                  | CH                               |
| For remaining stopovers see...       |                                  |
| Costs / 1 / Share                    | 20                               |
| Costs / 1 / Cost center              | 1110                             |
| Costs / 2 / Share                    | 20                               |
| Costs / 2 / Cost center              | 2300                             |
| Costs / 3/ Share                     | 20                               |
| Costs / 3 / Cost center              | 1000                             |
| Period                               | up to today                      |
| Gen./Payroll area<br>other period    | D2<br>select, current month/year |
| Payroll area<br>other period         | D2<br>select, current month/year |
| FI2/ Payroll area<br>other period    | D2<br>select, current month/year |
| Receipts / 011 / Expenses            | TAXI                             |
| See above / Amount                   | 230                              |
| See above / Currency                 | ATS                              |
| See above / Date                     | 5th of curr. month               |
| See above / Text                     | Vienna                           |
| Gen.2/ Payroll area<br>other period  | D2<br>select, current month/year |
| Acctg2/ Payroll area<br>other period | D2<br>select, current month/year |
| FI3 / Payroll area<br>other period   | D2<br>select, current month/year |


## Recording an Advance Application

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Trip Advances</i> |
| <b>Transaction Code</b> | PR03   |

2. On the *Trip Advances* screen, enter, for example, the personnel number *1000* in the *personnel number* field or select an employee via match code search.
3. Choose .
4. Choose .
5. On the *Trip Data Maintain: Advances* screen, enter the relevant advance in DEM, for example 500.00.
6. Choose .

Via advance entry (also called cash office transaction), the advance, in this case amounting to 500.00 DM, is paid directly to the employee, that is at the cash office. The date used for the advance is the current system date. The trip status is immediately set to Request approved / accounted, and the advance which has already been paid to the employee is then posted during the next run in financial accounting.

7. Please make a note of the advance posting code.
8. Choose  until the overview tree appears.

---

**Transferring an Advance to Financial Accounting**

## Transferring an Advance to Financial Accounting



1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Transfer to Accounting → Create posting run</i> |
| <b>Transaction Code</b> | PRFI   |

2. The *Create Posting Run* screen appears.

3. Enter the following data:

| <b>Field</b>     | <b>Data</b>                |
|------------------|----------------------------|
| Payroll area     | D2                         |
| Other period     | Select, current month/year |
| Personnel number | 1000                       |

4. Choose .
5. Choose  until the overview tree appears.

## Recording Remaining Trip Data for This Advance

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Enter Travel Expenses (Expert)</i> |
| <b>Transaction Code</b> | PR20  |

2. In the *Enter Personnel Number* dialog box, enter the personnel number 1000 and choose ✓.
3. In the dialog box choose *further trip schemas* and then ✓.
4. In the following dialog box choose the F4 help.
5. Select *D2* (international trip) and choose ✓.
6. The *Anja Müller, Pers No. XXXX, Trip no.* screen appears.
7. Enter the following data:

| Field             | Data                                 |
|-------------------|--------------------------------------|
| General trip data |                                      |
| From              | 1 <sup>st</sup> of curr. month 10:00 |
| End               | 9 <sup>th</sup> of curr. month 17:45 |
| Reason            | Customer, internat.                  |
| City              | Vienna                               |
| Country           | AT                                   |
| Miles             | 200                                  |
| Meals             | Select                               |


8. Choose ✓.
9. Enter, for example, the following data:

Confirm your receipts with *Enter*. In the dialog box you must enter additional information to your records. Note that the system only accepts the number of breakfasts, if you enter the complete duration of stay in this hotel. Note also that an entry in the *Country* field is required. In the *Reason* field always enter Overnight stay, because this is the required entry from the third hotel up.

| ExpTy | Amount | Currency | Date                           | Info         |
|-------|--------|----------|--------------------------------|--------------|
| FLBZ  | 480    | DEM      | 1 <sup>st</sup> of curr. month | Zurich       |
| HOTL  | 360    | CHF      | 3 <sup>rd</sup> of curr. month | Hilton-ZH    |
| BABZ  | 120    | CHF      | 3 <sup>rd</sup> of curr. month | ZH-Graz      |
| HOTL  | 3000   | ATS      | 5 <sup>th</sup> of curr. month | HInn-Graz    |
| BABZ  | 500    | ATS      | 5 <sup>th</sup> of curr. month | Graz-Vienna  |
| HOTL  | 7600   | ATS      | 7 <sup>th</sup> of curr. month | Astor-Vienna |

## Recording Remaining Trip Data for This Advance

|      |        |     |                                |                |
|------|--------|-----|--------------------------------|----------------|
| BABZ | 2100   | ATS | 7 <sup>th</sup> of curr. month | Vienna-Mailand |
| HOTL | 560000 | ITL | 9 <sup>th</sup> of curr. month | Milan          |
| FLBZ | 560    | DEM | 9 <sup>th</sup> of curr. month | Milan-FFM      |

10. Confirm your entries with .


Now the exchange rate fields will be filled with the values from table TCURR. Corrections can be made, if relevant. The default values for the VAT indicator are also set and can also be changed since these are merely default values.


11. Choose the *Add.dests* tab page to enter different stopovers for the trip.

12. Choose  *Create add.destination*.

13. Enter the following data:

| From                                 | Reason       | Loc    | Country |
|--------------------------------------|--------------|--------|---------|
| 1 <sup>st</sup> of curr. month 13:00 | Airport      | Zurich | CH      |
| 3 <sup>rd</sup> of curr. month 12:00 | Messe AG     | Graz   | AT      |
| 5 <sup>th</sup> of curr. month 10:00 | Prater & Co. | Vienna | AT      |
| 7 <sup>th</sup> of curr. month 12:30 | SC Milano    | Milan  | IT      |

14. Confirm your entries with .

15. In the *Alternative cost assignment for entire trip*, if other than master CA screen area, choose  to assign the trip by percentage to different cost centers.

16. In the *Trip Data Maintn: Enhanced cost assignment for entire trip* dialog box, enter, for example, the following data:

| Distribution | Cost center |
|--------------|-------------|
| 20           | 1110        |
| 20           | 2300        |
| 20           | 1000        |

17. Choose .

18. Choose  *Trip status*.

19. The *Trip Data Maintn: Status* screen appears.

20. Set the trip status to *Trip completed / Report recorded and to be settled*.

21. Choose .

22. Make a note of the trip number.

23. The overview tree appears.




## Trip Approval with the Approval Tool

1. Call up the transaction as follows:


|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Approve trip</i> |
| <b>Transaction Code</b> | PRAP  |

2. On the *Approval of Trips* screen, enter the following data:

| Field            | Data |
|------------------|------|
| Personnel number | 1000 |

3. Choose .

In the following list, the entered trip appears with the status *Trip completed / To be accounted*. You can now simulate the trip here, display or change the trip, display corrections, approve the trip or set it to *Trip on hold*. Our attention is limited at this point to approval of the trip and its simulation.

4. Select the trip and choose .
5. Choose *List → Display Trip* to display the accounting form on the screen.
6. Choose  until the overview tree appears.

## Accounting a Trip



## Accounting a Trip

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses →<br/>Periodic processing → Settle trips</i> |
| <b>Transaction Code</b> | PREC  |

2. On the *Settlement of Trip Data* screen, enter the following data:

| <b>Field</b>     | <b>Data</b>                |
|------------------|----------------------------|
| Payroll area     | D2                         |
| other period     | Select, current month/year |
| Personnel number | 1000                       |

3. Choose .
4. Choose  until the overview tree appears.



**Transfer of Accounting Results to Financial Accounting****Transfer of Accounting Results to Financial Accounting**



1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Transfer to Accounting → Create posting run</i> |
| <b>Transaction Code</b> | PRFI   |

2. The *Create Posting Run* screen appears.

3. Enter the following data:



| <b>Field</b>     | <b>Data</b>                |
|------------------|----------------------------|
| Payroll area     | D2                         |
| other period     | Select, current month/year |
| Personnel number | 1000                       |

4. Choose .
5. Choose  until the overview tree appears.



## Adding a Receipt to a Posted Trip

1. Call up the transaction as follows:




|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Transfer to Accounting → Manage posting runs</i> |
| <b>Transaction Code</b> | PRRW  |

2. Select any trip.
3. Choose  *Post*.
4. In the dialog box, choose *Post immed.*
5. Choose  until the overview tree appears.
6. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Manager</i> |
| <b>Transaction Code</b> | TRIP  |

7. In the personnel number field, enter, for example, 1000 or select an employee via matchcode search and choose .
8. The *Welcome to the Travel Manager* screen appears.
9. Select the trip you want to add a receipt.
10. Choose  *Change*.
11. Confirm the dialog box with *Yes*.
12. In the *Travel Expenses: Anja Müller, Trip no.* screen enter, for example, the following data:

| Field        | Data                                 |
|--------------|--------------------------------------|
| Expense type | TAXI, or select via matchcode search |
| Amount       | 230                                  |
| Currency     | ATS                                  |
| Date         | 5 <sup>th</sup> of curr. month       |
| Text         | Vienna                               |

13. Confirm your entries.
14. Choose  *Trip status*.
15. The *Trip Data Maintn: Status* dialog box appears.
16. Set the trip status to *Trip completed / Report recorded and to be settled*.
17. Choose .
18. Choose  until the overview tree appears.  
In the dialog box choose *Yes*.

## Renewed Approval with Correction Display


**Renewed Approval with Correction Display**

1. Call up the transaction as follows:


|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Approve trip</i> |
| <b>Transaction Code</b> | PRAP  |

2. On the *Approval of Trips* screen, enter the following data:

| Field            | Data |
|------------------|------|
| Personnel number | 1000 |


3. Choose .


4. Select your trip.


5. Choose .



As a result you see the last changes of the trip. In this case, you see your previously added receipt.

6. Choose .

7. Choose .

8. Choose  until the overview tree appears.



## Renewed Trip Accounting

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Settle trips</i> |
| <b>Transaction Code</b> | PREC  |

2. On the *Settlement of Trip Data* screen, enter the following data:

| Field            | Data                       |
|------------------|----------------------------|
| Payroll area     | D2                         |
| other period     | select, current month/year |
| Personnel number | 1000                       |

3. Choose .
4. Choose  until the overview tree appears.





Posting the Difference Amount to Financial Accounting


## Posting the Difference Amount to Financial Accounting

1. Call up the transaction as follows:


|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Travel Management → Travel Expenses → Periodic processing → Transfer to Accounting → Create posting run</i> |
| <b>Transaction Code</b> | PRFI   |

2. Enter the following data:

| Field            | Data                       |
|------------------|----------------------------|
| Payroll area     | D2                         |
| other period     | select, current month/year |
| Personnel number | 1000                       |

3. Choose .

For obvious reasons, only the difference amount of the new receipt is posted to financial accounting. Posting goes to the different cost centers which were specified in cost distribution for the entire trip. Since only 60% was entered there, the remaining 40% is posted to the master cost center (cost center 2200). Previous postings are not considered.

4. Choose  until the overview tree appears.

---

**Absence Approval/Rejection**

## Absence Approval/Rejection

### Purpose

This scenario describes how an employee creates a leave request, which is locked because it has not been approved. Two subsequent processes are possible: If the employee's superior approves the leave request, the employee's personnel administrator has to unlock the leave request and check the employee's leave entitlement. The employee's superior rejects the leave request, adding an explanatory note. The employee is informed automatically.

### Process Flow

You can find the data for this process under [?](#) [\[Page 59\]](#).

1. [Entering a Leave Request \[Page 60\]](#)
2. [Approving a Leave Request \[Page 61\]](#)
3. [Unlocking a Leave Request \[Page 62\]](#)
4. [Checking the Status of a Leave Request \[Page 63\]](#)
5. [Rejecting a Leave Request \[Page 64\]](#)

## Data Used During This Process

| Field                                       | Data    |
|---|---------|
| Personnel number                            | 1001    |
| Steps 1, 4, 5<br>Person entering<br>request | WF-HR-A |
| Steps 2, 5<br>Head of<br>department         | WF-HR-M |
| Step 3<br>Administrator                     | WF-HR-2 |

## Entering a Leave Request

# Entering a Leave Request

## Use

During this exercise, you will log on under various logon names. You are recommended to keep them open.



You can find out which logon and user the current work area belongs to by choosing *System* → *Status*.



## Procedure

1. Log on as the user **WF-HR-A** using the password **Welcome**.
2. Call up the transaction as follows:



|                         |  |
|-------------------------|--|
| <b>Menu path</b>        | <i>Human Resources</i> → <i>Personnel Management</i> → <i>Administration</i> → <i>HR Master Data</i> → <i>Maintain</i> |
| <b>Transaction code</b> | PA30   |

3. Enter the following data:

| Field            | Data |
|------------------|------|
| Personnel number | 1001 |

4. Choose .
5. Choose the *Working times* tab page.
6. Select *Absences*.
7. In the *Period* field, select *Today*.
8. Choose .


The *Subtypes for infotype Absences* dialog box appears.

9. Select *0100* in the *A/AT* type column.
10. Choose .
11. On the *Create absences* screen, choose .

The message *Record created* is displayed in the status bar.



Creating the leave request triggers an event that starts the *Absence Approval* workflow.

12. Choose  until the overview tree appears.


## Approving a Leave Request

### Use

The leave request is first approved by the head of the department, David Grecco, and then unlocked by the personnel administrator. The administrator, Michaela Maier, can then view the result in her Office Inbox.






### Procedure

1. Log on as the user **WF-HR-M** using the password **Welcome**.

If a message appears saying that you have unread documents in your inbox, choose .

2. Call up the transaction as follows:

|                         |                           |
|-------------------------|---------------------------|
| <b>Menu path</b>        | <i>Office → Workplace</i> |
| <b>Transaction code</b> | SBWP                      |

3. Choose *Inbox → Workflow*.
4. In the *Workflow* area, select the line *Approval of Absence Request for Michaela Maier*.
5. Choose .
6. On the *Approval Leave for Michaela Maier for <today's date>* screen, choose .  
The system displays the *Display Absences* screen with the leave request previously submitted by Michaela Maier.
7. Choose  until the *Decision Step in Workflow* screen appears.
8. Choose *Approve absence*.
9. In the dialog box, choose  *Complete work item*.
10. Choose  until the overview tree appears.

## Unlocking a Leave Request

## Unlocking a Leave Request






### Use

After the employee's superior has approved the leave request, the personnel administrator, Mike Kaufmann (WF-HR-2), still has to check the employee's leave entitlement and unlock the leave request.

### Procedure

1. Log on as the user **WF-HR-2** using the password **Welcome**.
2. Call up the transaction as follows:

|                         |                           |
|-------------------------|---------------------------|
| <b>Menu path</b>        | <i>Office → Workplace</i> |
| <b>Transaction code</b> | SBWP                      |

3. Choose *Inbox → Workflow*.
4. In the *Workflow* area, select the line *Absence: Leave for Employee Michaela Maier*.
5. Choose .
6. In the *Approve absence Leave for employee Michaela Maier by unlocking it* screen, choose .
7. Choose .
8. In the dialog box, choose  *Complete work item*.
9. Choose  until the overview tree appears.


## Checking the Status of a Leave Request

### Use

The administrator Michaela Maier can now check her inbox to see if the leave request was completely approved, partially approved, or if it was rejected.


### Procedure

1. Log on as the user **WF-HR-A** using the password **Welcome**.




If a message appears saying that you have unread documents in your inbox, choose, 

2. Call up the transaction as follows:

|                         |                           |
|-------------------------|---------------------------|
| <b>Menu Path</b>        | <i>Office → Workplace</i> |
| <b>Transaction Code</b> | SBWP                      |

3. Choose *Inbox*.
4. In the *Inbox* area, select the line *Leave from <today's date> to <today's date> was approved...*
5. Choose .

The *Display Absences* screen appears, showing the leave request that was approved by the head of department and unlocked by the personnel administrator.

6. Choose .
7. In the dialog box, choose  *Complete work item*.
8. Choose  until the overview tree appears.

## Rejecting a Leave Request

## Rejecting a Leave Request

### Use

Administrator Michaela Maier (WF-HR-A) wants to enter a leave request for a day of leave.



### Procedure

1. Log on as the user **WF-HR-A** using the password **We1come**.
2. Call up the transaction as follows:



|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Administration → HR Master Data → Maintain</i> |
| <b>Transaction Code</b> | PA30   |

3. Enter the following data:

| Field            | Data |
|------------------|------|
| Personnel number | 1001 |


4. Choose .
5. Choose the *Working times* tab page.
6. Select *Absences*.
7. In the *Period* field, select *Today*.
8. Choose .


The *Subtypes for infotype "Absences"* dialog box appears.

9. Select *0100* in the *A/AType* column.
10. Choose .
11. On the *Create absences* screen, choose .



Creating the leave request triggers an event that starts the *Absence Approval* workflow.

12. Choose  until the overview tree appears.
13. Log on as the user **WF-HR-M** using the password **We1come**.

If a message appears saying that you have unread documents in your inbox, choose .


14. Call up the transaction as follows:

|                         |                           |
|-------------------------|---------------------------|
| <b>Menu Path</b>        | <i>Office → Workplace</i> |
| <b>Transaction Code</b> | SBWP                      |

15. Choose *Inbox → Workflow*.
16. In the *Workflow* area, select the line *Approval of Absence Request for Michaela Maier*.




Rejecting a Leave Request

17. Choose .

The *Display Absences* screen appears.


18. Choose  until the *Decision Step in Workflow* screen appears.

19. Choose *Not approved*.

20. In the dialog box, choose  *Attachments*.

21. In the dialog box, enter the following data:


| Field | Data               |
|-------|--------------------|
| Class | SCR                |
| Title | Leave not approved |


22. Choose .

23. The *Change Document: MESSAGE Language EN* screen appears, where you can enter a text giving reasons for the refusal, for example, "Your presence is absolutely necessary on this date".

24. Choose .


25. Choose .

26. In the dialog box, choose  *Complete work item*.

27. Choose  until the overview tree appears.

The administrator Michaela Maier can now check her inbox to see if the leave request was completely approved, partially approved, or if it was rejected.

28. Log on as the user **WF-HR-A** using the password **We1come**.

If a message appears saying that you have unread documents in your inbox, choose, .

29. Call up the transaction as follows:

|                         |                           |
|-------------------------|---------------------------|
| <b>Menu Path</b>        | <i>Office → Workplace</i> |
| <b>Transaction Code</b> | SBWP                      |

30. Choose *Inbox*.

31. Select the line *Requested Leave from <today's date> to <today's date>*.

32. Choose .

A dialog box appears, informing you that your leave request was not approved.

33. To see the reason for the rejection, choose *Edit → Attachments → Display*.

34. To exit the document display, choose .

35. In the *Decision Step in Workflow* screen, choose *Cancel request*.

The *Delete Absences* screen appears.



Michaela Maier can now delete her leave request.

36. Choose .

---

**Rejecting a Leave Request**

The system displays a message confirming that the record was deleted.

37. In the dialog box, choose  *Complete work item*.
38. Choose  until the overview tree appears.

## Human Resources Information System

### Purpose

This scenario demonstrates how you can use the graphical Human Resources Information System to display evaluations on the organization, personnel situation, and course offerings within your enterprise.

The standard R/3 System contains basic evaluations that you can modify using the Implementation Guide in accordance with your information requirements.

This process chain is limited to standard evaluations that provide information on the organization itself, the personnel situation, and corresponding qualifications. The evaluations use an existing organizational structure.

### Process Flow

You can find the data for this process under [?](#) [Page 68]

[Calling up the Human Resources Information System \[Page 69\]](#)

---


**Data Used During This Process****Data Used During This Process**

| <b>Field</b>        | <b>Data</b>                    |
|---------------------|--------------------------------|
| Organizational unit | 100 (Executive Board, Germany) |
| Date                | Today's date                   |
| Period indicator    | D                              |
| User                | WF-HR-1 (Sebastian Schulz)     |
| Password            | welcome                        |

## Calling up the Human Resources Information System

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources</i> → <i>Information System</i> → <i>Reporting Tools</i> → <i>PPIS - HIS</i><br><br>Alternatively:<br><i>Information Systems</i> → <i>Human Resources</i> → <i>Reporting Tools</i> → <i>PPIS - HIS</i> |
| <b>Transaction Code</b> | PPIS  |


If a dialog box appears requesting you to enter the plan variant, choose . You have now copied the defaulted plan variant *Current plan*.



In the initial screen, you can make general settings for the additional evaluations.

2. In the *Graphical display* area, select *Organizational units*.
3. In the *Entry* area, select the F4 input help for the *Organizational units* field.

If a dialog box appears, select the *Structure search* tab page.

4. In the *Organizational unit* dialog box, choose *Organizational Structure* → *IDES AG* → *Executive Board - Germany*.
5. Select *Executive Board Germany*.
6. Choose .
7. On the *HIS: Access Object* screen choose *Defaults*.



On this screen, you can set the data parameters as well as general information regarding the evaluation time period.

8. Choose *Continue*.



In the *View* field, you can select the views of the organizational structures available for graphics display and the corresponding data preparation.


Note that the screen layout corresponds to the selected view in the areas *Graphical Display* and *Entry*.

9. Choose the view *IDES*.
10. Enter the following data:

| Field               | Data         |
|---------------------|--------------|
| Organizational unit | 100          |
| Date                | Current date |

## Calling up the Human Resources Information System

|                  |   |
|------------------|---|
| Period indicator | D |
|------------------|---|

11. Choose .

The system displays two dialog boxes. The *HRIS: Access Object* screen displays the graphical organizational structure of the enterprise. The *Reporting* screen displays all evaluations you can start in the Human Resources Information System.



We now show an evaluation to demonstrate the general procedure used in the Human Resources Information System. Use the same procedure to perform any other evaluations.

12. Maximize the *HIS: Access Object* screen with the Graphical Organization Structure Plan.

13. In the organization plan, select the second hierarchy level *Fi*.


14. In the top area of the *Reporting* dialog box, choose *Organization*.

In the lower part of the screen, you see all of the evaluation options contained in this sub-area.

15. Select *Staffing assignment*.

16. Choose *Help*.

You see documentation for the selected evaluation report.

17. Choose .

18. To display the corresponding detail data, double click on *Staffing assignment*.

If the *Staffing Assignment* screen appears, requesting you to enter an object ID, choose *Enter*.

You can display more information about the staffing assignment, if required.

19. Choose , until the *HIS: Initial Screen* appears with the *Reporting* dialog box.

20. In the top area of the *Reporting* dialog box, choose *Routine reports*.

21. In the lower area, double-click on *Employee List*.

On the *Employee List* screen, you see all of the employees assigned to the organizational unit *FI* (Financials and Administration).




You can export this index to MS Word or MS Excel, or send as an e-mail.


22. Choose *Print preview*.

23. Choose *Send*.

24. On the *Recipients* tab page, enter the following data:


| Field | Data    |
|-------|---------|
| Payee | WF-HR-1 |

25. Choose .

26. Choose  until the overview tree appears.

---

**Calling up the Human Resources Information System**

27. Log on as user *WF-HR-1* using password *Welcome* and language *EN*.
28. Choose *Office* → *Workplace*.
29. Choose *Inbox* → *Unread Documents*.
30. Double click on the document.
31. To open the attachment, choose *Employee List*.
32. Choose  until the overview tree appears.

## Personnel Development

### Purpose

The HR Module *Personnel Development* supports the Human Resources department in setting up qualification catalogs. You can store position requirements and qualifications of employees in the company in your qualifications catalog and later analyze this data by means of profile matchups.

Integration with *Training and Event Management* enables you to offset any qualification deficits by enrolling employees for further training in good time.

You can find more information about this process under [i](#) [Page 73].

### Process Flow

You can find the data for this process under [?](#) [Page 74].

1. [Displaying Profiles \[Page 75\]](#)
2. [Performing Career Planning for Persons \[Page 76\]](#)
3. [Displaying Profile Matchups and Booking Qualification Measures \[Page 78\]](#)
4. [Performing Succession Planning for Positions \[Page 80\]](#)
5. [Searching for Persons with Specific Qualifications \[Page 82\]](#)
6. [Personnel Development from an Organizational Unit's Point of View \[Page 83\]](#)



## Additional Process Information

In this example, further career and development options are displayed for a director in the model company IDES. In the area of succession planning, a potential successor is sought at the same time whose qualifications best meet the profile of the position that will become vacant as a result.

In a final process step, we demonstrate a further possible use of software-supported personnel development with the example of performing career and succession planning for an organizational unit.

---

**Data Used During This Process****Data Used During This Process**

| Field            | Data  |
|------------------|---|
| Personnel number | 1000 (Anja Müller)                                |
| Position         | 50000052 (Department Manager Human Resources (D)) |

## Displaying a Profile

### Use

This process step demonstrates how to call a person's profile including qualifications, dislikes and so on.



### Procedure

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Development → Profile → Display</i> |
| <b>Transaction Code</b> | PPPD  |

2. On the left, expand the tree *Person → Search term*.
3. Double-click *Search term*.
4. Enter the following data in the dialog box:

| Field     | Data |
|-----------|------|
| With name | Ric  |

5. Choose  *Find*.  
A list of names beginning with *Ric* is displayed on the left.
6. Double-click *Alexander Rickes*.  
The qualifications, potentials and so on of the person selected are displayed.
7. Choose  until the overview tree appears.

## Performing Career Planning for Persons

## Performing Career Planning for Persons

### Use

In this step of the process, Anja Müller, currently employed as Director of the Human Resources department, is looking for career development opportunities in the IDES AG company. She is interested in developing her career in both the vertical and the horizontal direction.

The personnel officer responsible for management shows her possible career items in the career model appropriate to her individual suitability profile.

### Procedure

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Development → Planning → Career</i> |
| <b>Transaction Code</b> | PPCP  |

2. Enter the following data on the *Career Planning* screen:

| Field                              | Data   |
|------------------------------------|--------|
| Career planning for (left field)   | Person |
| Career planning for (right field)  | 1000   |
| Planning criteria - Include career | Select |

3. Choose .

On the *Career Planning* screen a number of reporting options are available.

The R/3 System offers you two kinds of careers: *management careers* and *business careers*.

In the branch *Director* you can see the various positions possible for the horizontal career path, in the branch *Executive Board* you can see the various positions possible for a vertical career path.

As personnel officer you should first find out all of the information that is important for Anja Müller's further career.

4. Select *Anja Müller*.
5. Choose *Profile*.

On the screen *Person: Display Profile (xxx - xxx)* information regarding the qualifications, potential, preferences, and dislikes of Frau Müller is displayed including the proficiency evaluations.




Similarly, if you want to start reports to display the requirements for jobs or positions, you first select the job (step 4) and choose *Profile*.



6. Choose *Goto → HR Master Data*.

## Performing Career Planning for Persons

On the *Display HR Master Data* screen, information is displayed from Personnel Administration about Anja Müller.

7. Choose  to return to the screen *Person: Display Profile (xxx - xxx)*.
8. Double-click *HR Management Skills*.

In the dialog box that appears, detailed information about the qualification *HR Management Skills* is displayed, such as possible proficiencies and additional data. You can configure this and other qualification information as required.

9. Choose .
10. Choose  to return to the *Career Planning* screen.
11. Expand the tree *Management Career* → *Executive Board* → *Vice President*.

All of the possible jobs and positions suitable for Anja Müller are displayed. Vacant positions are indicated.

12. Select *Management Career* → *Executive Board*.


13. Choose .

The R/3 System displays information on the suitability of Anja Müller for the positions in the enterprise.

Positions with a green traffic light indicate that the candidate fulfills all of the prerequisites and is very suitable, a yellow light indicates positions for which the candidate is suitable, and a red light indicates positions for which the candidate is unsuitable.

14. Select *Executive Board* (yellow light).



The next process step demonstrates how to carry out a profile matchup between the requirements of the job and the qualifications of the person, and how to book the necessary further training measures. Since this is an enhancement of this process step, do not exit the step in the usual way by choosing , just proceed directly with the step [Displaying a Profile Matchup and Booking Qualification Measures \[Page 78\]](#).



## Displaying Profile Matchups and Booking Qualification Measures

## Displaying Profile Matchups and Booking Qualification Measures

### Use

Profile matchups help to identify possible skills and qualification deficits and allow you to take measures to offset these, such as booking training courses.

### Prerequisites



You have worked through the step [Performing Career Planning for Persons \[Page 76\]](#) or the step [Performing Succession Planning for Positions \[Page 80\]](#) and selected either a person or a job.

### Procedure

1. Choose *Goto* → *Profile Matchup*.

On the *Display Profile Matchup* screen the requirements of the job are matched against the qualifications of the person.

In the category *Social Competence* you notice that the qualification for *management techniques* does not meet the requirements profile.

2. To generate proposals for training to offset this qualification deficit, choose *View* → *Editing Options*.
3. In the dialog box *Display Profile Matchup* that appears, select the option *Generate Training Proposals*.
4. Choose .
5. Beside *management techniques*, choose .

The *Book Attendance: Data* screen appears where you can book the candidate for a business event to provide the required qualifications.

6. Select the first event listed.
7. Choose *Book*.

A warning message appears at the bottom of the screen.


8. Select the message.
9. Choose *Confirm Booking*.

In the status line, the message *Attendance was booked* appears.

In the area *Business event catalog* you notice that the number in the *Bookings* field has changed.



The R/3 System can be set up in such a way that once an attendee has successfully attended a business event, the relevant qualification is transferred to the attendee and the deficit is offset.

10. Choose  until the overview tree appears.

---

Displaying Profile Matchups and Booking Qualification Measures

## Performing Succession Planning for Positions

## Performing Succession Planning for Positions

## Procedure

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Development → Planning → Succession</i> |
| <b>Transaction Code</b> | PPSP  |

2. On the *Succession Planning* screen, choose .

3. Enter the following data:

| Field                                 | Data     |
|---------------------------------------|----------|
| Succession planning for (left field)  | Position |
| Succession planning for (right field) | 50000052 |

4. Choose .

5. Select *Succession plan*.

6. Choose .

The expanded succession plan displays a list of possible persons as succession candidates, sorted by qualification, potential, designations and so on.

7. Choose .

A table is displayed showing possible candidates sorted in descending order.

A traffic light icon on the left indicates the suitability of the individual persons as follows: a green light indicates that the candidate fulfills all of the prerequisites and is very suitable, a yellow light indicates that the candidate fulfills some of the prerequisites and is suitable, and a red light indicates that the candidate is unsuitable.

On the right, the qualifications, potentials, designations, preferences, and careers of the individual persons are displayed.


8. Choose *View → Suitability % on*.

In the *Suitability* field, the suitability percentages of the candidates are displayed:

- 100% - 66%: very suitable
  - 33% - 66%: suitable
  - Under 33%: not suitable
9. Select *Alexander Rickes*.



To conclude, you can run the profile matchup again as described in [Displaying Profile Matchup and Booking Qualification Measures \[Page 78\]](#).

If you do not want to run the profile matchup, choose  to return to the overview tree.







## Searching for Persons with Specific Qualifications

## Searching for Persons with Specific Qualifications

### Procedure

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Development → Information System → Reports → Search → For Qualifications</i> |
| <b>Transaction Code</b> | PPPE_SEARCH_FOR_Q  |

2. On the left, expand the tree *Qualification → Structure search*.
3. Double-click *Structure search*.
4. In the area below, expand the tree *General education → School education /university education → Degree programs → Business Administration Degree*.
5. Double-click *Business Administration Degree*.
6. Double-click *Master's Business Administration Degree*.
7. Expand the tree *Business Admin. Skills / Knowledge → HR Management skills*.
8. Double-click *HR Management skills*.
9. Expand the tree *Social Competence → Ability to organize and act*.
10. Double-click *Ability to organize and act*.
11. Double-click *Verbal, written communicative skills*.
12. Expand the tree *Language skills → English language skills*.
13. Double-click *English language skills*.

The requirements you select are displayed in the table on the right on the *Qualifications* tab page.




You can specify other search criteria on the tab pages *Restrict to object types*, *Restrict further* and *Availability*.

14. Choose  and .

On the *Find Objects for Qualifications* screen, persons that completely or partially fulfill the required qualifications are displayed.

The persons are sorted in descending order according to the number of qualifications they have, in other words, the person with the highest number of qualifications is top of the list.

The number in the left column indicates the number of qualifications fulfilled.

15. Choose  until the overview tree appears.



## Personnel Development from Organizational Unit's Point of View

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Development → Planning for Organizational Unit</i> |
| <b>Transaction Code</b> | PPEM   |

If the *Choose Organizational Unit* dialog box is displayed, open the tree *IDES AG → Exec. Director Germany → Human Resources (D)* and double-click *Human Resources (D)*.

On the screen *Planning for Organizational Unit*, the Human Resources department and all its underlying departments are displayed.


2. Select *Personnel Administration (D)*.
3. Choose .
4. Mark the checkbox beside *Alexander Rickes*.
5. Mark the checkbox beside *Director Personnel Admin.*
6. To run a profile matchup between the position and the person, choose  *Comparison*.

The *Display Profile Matchup* screen is displayed.



[SA6]

You can now proceed to book training courses as described in [Displaying Profile Matchups and Booking Qualification Measures \[Page 78\]](#).

7. Choose  until the overview tree appears.



Appendix

## Appendix

[Bild 1 \[Page 85\]](#)

[Bild 2 \[Page 86\]](#)

[Bild 3 \[Page 87\]](#)

[Bild 4 \[Page 88\]](#)

[Bild 5 \[Page 89\]](#)

[Bild 6 \[Page 90\]](#)

## Figure 1

Figure 2

## Figure 2

## Figure 3

Figure 4

## Figure 4



## Figure 5

Figure 6

## Figure 6

## Personnel Cost Planning

### Purpose

This process shows you how to plan personnel costs using target specifications or basic pay, including vacant or part-time positions. The goal of Personnel Cost Planning is to support various cost planning processes. Once the personnel cost planning process is completed for your company, you can transfer the desired plan process to budget planning for the entire company.

If personnel planning for the current year is not yet at an advanced stage, run the process with the figures from the previous year.

### Process Flow

You can find the data for this process under [?](#) [Page 92].

1. [Planning Personnel Costs in HR for the Current Year Using Projected Pay \[Page 94\]](#)
2. [Resuming Planning that has been Completed \[Page 98\]](#)
3. [Planning Personnel Costs Using Basic Pay \[Page 99\]](#)
4. [Planning Personnel Costs Using Payroll Results \[Page 101\]](#)
5. [Releasing a Plan Scenario for Budget Planning \[Page 103\]](#)
6. [Transferring Planned Personnel Costs to Budget Planning \[Page 104\]](#)
7. [Displaying Planned Personnel Costs for the Current Year in Cost Accounting \[Page 105\]](#)

## Data Used During This Process

## Data Used During This Process

| Field                          | Data   |
|--------------------------------|--|
| Plan version                   | Current plan   |
| Organizational unit from       | 1001 (Human Resources - D Matchcode)                               |
| Planning period from           | 01. 01. to 31.12. of the planning year                             |
| Depth of org. structure        | Blank  |
| Include organizational changes | Blank  |
| Period                         | 9 (annually)   |
| Currency                       | DEM  |
| Salary surveys                 | Blank  |
| Use object abbreviation only   | Select   |
| Display all positions          | Blank  |
| Sec. PA-D(S)                   | Select   |
| Number                         | 3,00   |
| Date                           | 01. 07. of the planning year                                       |
| Cost item (input help)         | G050   |
| Start date for the increase    | 01. 07. of the planning year                                       |
| Percentage of increase         | 10   |
| Plan scenario                  | 01 PP Planning personnel area 01.01. – 31.12. of the planning year |
| Planning group                 | <your user name>   |
| Comments                       | Annually in DEM  |
| Password                       | Do not assign a password   |
| Organizational unit from       | 100  |
| Planning period from           | 01. 01. to 31.12. of the planning year                             |
| Depth of org. structure        | Blank  |
| Include organizational changes | Blank  |
| Period                         | 9 (annually)   |
| Currency                       | DEM (see key)  |
| Use object abbreviation only   | Blank  |
| Display all positions          | Select   |

Data Used During This Process

|                       |       |
|-----------------------|-------|
| Display all positions | Blank |
| Controlling area      | 1000  |
| Cost center           | 2200  |
| Cost center group     | Blank |
| Fiscal year           | 2000  |
| From period           | 001   |
| To period             | 012   |
| Version               | 000   |
| Cost center group     | H1220 |
| Cost element group    | OAS   |

## Planning Pers. Costs in HR for Current Year Using Projected Pay

### Planning Pers. Costs in HR for Current Year Using Projected Pay

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Cost Planning → Scenario Group → Create → Projected Pay</i> |
| <b>Transaction Code</b> | PP28  |

2. Enter the following data:

| Field                          | Data                                   |
|--------------------------------|--|
| Plan version                   | Current plan                           |
| Organizational unit from       | 1001                                   |
| Planning period from, to       | 01. 01. to 31.12. of the planning year |
| Depth of org. structure        | Blank                                  |
| Include organizational changes | Deselect                               |
| Period                         | Annually                               |
| Currency                       | DEM                                    |
| Salary surveys                 | Normal case                            |
| Use object abbreviation only   | Select                                 |
| Display all positions          | Deselect                               |

3. Choose .

If the *Error List Data Selection* screen appears, choose  *Continue without correction*.




The system displays positions for which cost data is missing. This is due to a missing payroll simulation. As a result, these personnel numbers will not be considered in Cost Planning.

On the *Change Personnel Costs: Overview of Organizational Units* screen, there are three tab pages: *Organizational unit*, *Cost center*, and *Cost object*. The reference values depict the starting values in absolute terms.

4. Choose the *Organizational unit* tab page.
5. To display the corresponding detail data, double click on *HR-D*.

If *0 00001001* is displayed instead of *HR-D*, choose *View → Key off*.

The system displays a table of all organizational units in the *HR-D* department, with current amounts and reference values.

6. Choose .
7. Double click on *Per.adm. (D)* (*Personnel Administration (D)*).

### Planning Pers. Costs in HR for Current Year Using Projected Pay

The system displays a table of the jobs in that organizational unit, with the corresponding number of positions.

You can change the number of positions on this screen.

8. Place the cursor on a free space in the table, press the right mouse button, and choose *Insert row*.
9. Choose input help for the *Cost object*.
10. Double click on *Sec. Pers. (D) (S)*.
11. Enter the following data in the dialog box:

| Field  | Data                         |
|--------|------------------------------|
| Number | 3                            |
| Start  | 01. 07. of the planning year |
| End    | 31. 12. of the planning year |



Note that the number of jobs entered in the dialog box is the total number for this period.

12. Choose *Check*.
13. Choose .

On the *Change Personnel Costs: Cost Objects per Organizational Unit*, there is a new row with the following entries:

- Sec. Pers. (D) (S)
- 3,00
- 01. 07. of the current year
- 31. 12. of the current year
- 81,491.25

14. Choose .



In the *Per.adm.-D* area you can see the changes. The total amount has increased because two new secretaries were hired on 01.07. of the planning year. Planning for additional positions or a reduction in positions, however, is only valid in the current plan version – these changes do not affect Organizational Management.

15. Choose the *Organizational unit* tab page.
16. Double click on *Total*.
17. Choose .

SAP Business Graphics appears.


By choosing *2D view*, *3D view*, and *Options* → *Color assignment*, you can modify the graphic to meet your requirements.

### Planning Pers. Costs in HR for Current Year Using Projected Pay






18. Choose , until you get back to the *Change Personnel Costs: Cost Objects per Organizational Unit* screen.
19. On the *Cost Objects* tab page, select the *Sec. Pers. (D) (S)* row with the number 4.
20. Choose  *Cost Items*.



The process simulates a percentage increase in cost items. As long as the cost items are not directly valuated (meaning valuated for each employee) the changes do not affect the organizational areas.


21. Choose  *Cost Items*.
22. In the *Change Cost Items* dialog box, enter the following data:

| Field                       | Data                         |
|-----------------------------|------------------------------|
| Cost item                   | G050                         |
| Start date for increase     | 01. 07. of the planning year |
| Percentage rate of increase | 10                           |

23. Choose .
24. Choose , until you get back to the *Change Personnel Costs: Overview of Organizational Units* screen.
- On the *Organizational Unit* tab page you can see how the values for *Position/Job* have changed.
25. To change the absolute values of the cost items, choose  *Cost Items*.
- The *Change Cost Items* dialog box with the corresponding G/L accounts (cost elements) appears. Enter new values by overwriting the existing ones.
- These changes are not valid for cost items that are directly valuated. They are only applicable to the current plan scenario.
26. Choose .
27. If you want to display the difference between the planned and the reference value as a percentage, choose *Settings* → *Reference value* → *Percentage*.
28. To return to absolute values, choose *Settings* → *Reference value* → *Absolute*.
29. Choose the *Cost Center* tab page.
- The screen title changes to *Change Personnel Costs: Overview of Cost Centers*.
- The personnel costs are now listed according to cost center.
30. To display the organizational units belonging to the *Human Resources* cost center, double click on *Human Resources*.
31. Choose  *Cost Items*.
- The cost center is broken down into its corresponding cost items and G/L accounts (cost elements).
- Note the increase in cost items compared to the initial values (= reference values).




**Planning Pers. Costs in HR for Current Year Using Projected Pay**

32. Choose .


In the dialog box, you can save your plan (without reference values) under your own version number.

33. Enter the following data:

| Field          | Data   |
|----------------|--|
| Plan scenario  | 01 PP Planning personnel area 01.01. – 31.12. of the planning year |
| Scenario group | <your user name>   |
| Comments       | Annually in DEM  |
| Password       | Do not assign a password   |

34. Choose .

In the status bar, the following message appears: *Scenario group 01 PP <user name> saved.*

35. Choose  until the overview tree appears.



In the *Personnel Cost Planning* dialog box, choose *Yes*.

## Resuming Planning that has been Completed

## Resuming Planning that has been Completed

1. Call up the transaction as follows:



|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Cost Planning → Administration</i> |
| <b>Transaction Code</b> | PP26   |

2. Open the *Human Resources* folder with the period you used before.
3. Select your plan scenario.
4. Choose .
5. Choose *Scenario Group → Reference Plan → Display*.
6. Open the *Human Resources* folder with the period you used before.
7. Double click on your plan scenario.
8. In the dialog box, choose .



The plan scenario appears with all its entries.



By choosing *View →...* you can display the different views, for example:

- Personnel costs per organizational unit / account assignment object
  - Cost objects per organizational unit / account assignment object
  - Personnel costs per cost object
  - Cost items per cost object
  - Cost items per organizational unit / account assignment object
8. Choose  until the *Plan Scenario Administration* screen appears.
  9. Choose .

If you have saved several scenarios, you can load one of them as a reference.

10. To load a different plan scenario, choose  *Reference plan*.
11. Open the folder with the required plan scenario.
12. In the *Selecting planning* dialog box, double click on your chosen scenario.
13. Choose  until the overview tree appears.

In the *Personnel Cost Planning* dialog box, choose *Yes*.

## Planning Personnel Costs Using Basic Pay

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Cost Planning → Scenario Group → Create → Basic Pay</i> |
| <b>Transaction Code</b> | PP2B  |

2. Enter the following data:

| Field                          | Data                                   |
|--------------------------------|--|
| Plan version                   | Current plan                           |
| Organizational unit from       | 1001                                   |
| Planning period from           | 01. 01. to 31.12. of the planning year |
| Depth of org. structure        | Blank                                  |
| Include organizational changes | Deselect                               |
| Period                         | Annually                               |
| Currency                       | DEM                                    |
| Use object abbreviation only   | Deselect                               |
| Display all positions          | Select                                 |

3. Choose .

If the *Error List Data Selection* screen appears, choose  *Continue without correction*.

4. Choose the *Organizational unit* tab.

5. Double click on *HR-D*.

If *0 00001001* is displayed instead of *HR-D*, choose *View → Key off*.

The system displays a list of the people belonging to this organizational unit.

6. If you want to consider the individual cost items for a person, choose the person by double clicking on the area *Cost object*.

The system displays a list of the cost items from the *Basic Pay of a Person* infotype.


7. Choose  *Cost Items*.

8. Change the amount of a cost item by overwriting it.

9. Choose .

10. Choose , until you get back to the *Change Personnel Costs: Overview of Organizational Units* screen.

11. Look at the effects of your changes.

12. Choose  until the overview tree appears.

In the *Personnel Cost Planning* dialog box, choose *Yes*.

**Planning Personnel Costs Using Basic Pay**


## Planning Personnel Costs Using Payroll Results

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Cost Planning → Scenario Group → Create → Payroll Results</i> |
| <b>Transaction Code</b> | PP2P  |

2. Enter the following data:

| Field                          | Data                                   |
|--------------------------------|--|
| Plan version                   | Current plan                           |
| Organizational unit from       | 1001                                   |
| Planning period from           | 01. 01. to 31.12. of the planning year |
| Depth of org. structure        | Blank                                  |
| Include organizational changes | Deselect                               |
| Period                         | Annually                               |
| Currency                       | DEM                                    |
| Payroll result period          | 01. 01. to 31.12. of the planning year |
| Use object abbreviation only   | Deselect                               |
| Display all positions          | Deselect                               |

3. Choose .

If the *Error List Data Selection* screen appears, choose  *Continue without correction*.

The *Change Personnel Costs: Overview of Organizational Units* screen appears.

Personnel costs are displayed. These are based on payroll results of the position holders for the period selected at the top of the screen.



You can also simulate projected payroll results (see payroll result period).


4. If you want to consider the individual cost items in payroll for a person, choose the person by double clicking on the *Cost object* area.

The system displays a list of the cost items from cost and payroll account for the person.

5. Choose  *Cost Items*.



For additional examples, refer to the procedures for planning using projected pay and basic pay.

6. Choose  until the overview tree appears.

Choose Yes in the dialog box that appears.


**Planning Personnel Costs Using Payroll Results**

## Releasing a Plan Scenario for Budget Planning


1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Personnel Cost Planning → Planning Integration with Controlling → Release Plan Scenario</i> |
| <b>Transaction code</b> | PP27  |

2. Select the scenario you saved earlier.

3. Choose .

In the status bar, the message *Plan scenario XXX is consistent and can be released* appears.


4. Choose .

5. Choose Yes in the dialog box that appears.

In the status bar, the message *Plan scenario XXX was released for Controlling* appears.



You can still make changes once the scenario has been released. If you then release again, only the changes are transferred.

6. Choose  until the overview tree appears.

## Transferring Planned Personnel Costs to Budget Planning

## Transferring Planned Personnel Costs to Budget Planning

1. Call up the transaction as follows:


|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Accounting → Controlling → Cost Center Accounting → Planning → Planning Aids → Transfers → Personnel Costs</i> |
| <b>Transaction Code</b> | KPHR  |







In our example, we have only planned the personnel costs for the Human Resources department. We will therefore not transfer the stored plan scenario. However, to show this procedure, we will transfer a plan scenario for personnel cost planning for the entire company.

2. Enter the following data:

| Field       | Data |
|-------------|------|
| Version     | 000  |
| From period | 001  |
| To period   | 012  |
| Fiscal year | 2000 |

3. Choose .

If the *Set controlling area* dialog box appears, enter 1000 in the *Controlling area* field, and choose .

4. In the *Select a plan scenario in Personnel Cost Planning* dialog box, select the plan scenario, and choose .
5. Finish by choosing .
6. Choose  until the overview tree appears.



Displaying Planned Pers. Costs for Curr. Year in Cost Accounting

## Displaying Planned Pers. Costs for Curr. Year in Cost Accounting

1. Call up the transaction as follows:


|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Accounting → Controlling → Cost Center Accounting → Information System → Reports for Cost Center Accounting → Planning Reports → Cost Centers: Planning Overview.</i> |
| <b>Transaction Code</b> | KSBL   |

2. Enter the following data:

| Field       | Data   |
|-------------|--------|
| Cost center | 2200   |
| Fiscal year | 2000   |
| Period      | 1 - 12 |
| Version     | 0      |

3. Choose  *Execute*.

The *Cost Centers: Planning Report* screen appears, which shows an overview of planned personnel costs.

4. Choose  until the overview tree appears.


Choose Yes in the dialog box that appears.

---

**Individual Incentive Wages**

## Individual Incentive Wages

### Purpose

This process shows you how to use the Incentive Wages component for individual incentive wages. First, you specify which premium formula is used to determine a labor utilization rate from **cumulated** time ticket values. Next, all time tickets are recorded that have been submitted in individual incentive wages. Finally, you have an overview of the results and cumulations from the individual time tickets. 

The cumulation of time ticket values is determined first and foremost on the basis of the wage type. Piecework times are entered as wage type ML01; the times are cumulated in the standard fields. Actual times worked in time wages are entered as wage type ML02 and cumulated under the result type "average".

You can find more information about this process under [i](#) [Page 107].

### Process Flow

You can find the data for this process under [?](#) [Page 108].

1. [Determining the Premium Formula for the Period \[Page 110\]](#)
2. [Entering Time Tickets \[Page 111\]](#)
3. [Cumulations and Results in Individual Incentive Wages \[Page 113\]](#)

## Hiring Incentive Wage Earners

If you are more interested in the process flow for incentive wages than in the personnel actions such as, for example, Hiring, you can use the default personnel numbers prepared for the processes.



If you want to start with hiring employees for work on an incentive wage basis, note that they must be assigned to one of the following employee subgroups: DJ, DK, DO, DP. This is the only way to ensure that the time tickets you recorded in or transferred to incentive wages are used for the payroll run.

## Data Used During This Process

## Data Used During This Process

## General data

| Field                       | Data                                  |
|-----------------------------|---------------------------------------|
| Personnel number            | 1218 (Max Schmidt)                    |
| Premium formula             | 100 (target / actual with setup time) |
| Country grouping            | 01 (Germany)                          |
| Time ticket type            | 04 (Time wage)                        |
| Time ticket type            | 01 (Premium wage)                     |
| Payroll period              | 01.2000                               |
| Date                        | 02.01.2000                            |
| Labor time from             | 22:30 (shift start)                   |
| Labor time to               | 05:45:00 (end of shift)               |
| Yield                       | 90                                    |
| Base quantity               | 10                                    |
| Labor time: confirmed value | 8                                     |
| Labor time: Set value       | 1                                     |
| Setup time: confirmed value | 2                                     |
| Setup time: planned value   | 2                                     |

## Time ticket values

| Date                                 | Wage type | Time ticket values | Cumulated in       |      |                     |
|--------------------------------------|-----------|--------------------|--------------------|------|---------------------|
| 1. Working day of the current period | ML02      | Labor time         | Confirmation value | 7,75 | Result type average |
| 2. Working day of the current period | ML01      | Labor time         | Confirmation value | 8,00 | Cumulations         |
|                                      |           |                    | Target value       | 9,00 | Cumulations         |
|                                      |           | Setup time         | Confirmation value | 2,00 | Cumulations         |
|                                      |           |                    | Target value       | 2,00 | Cumulations         |

Data Used During This Process

Cumulations

|     | Labor time         | Setup time   |                    |              |         |
|-----|--------------------|--------------|--------------------|--------------|---------|
| Day | Confirmation value | Target value | Confirmation value | Target value | Result  |
| 00  | 8                  | 9            | 2                  | 2            | 110,000 |
| 01  | 0                  | 0            | 0                  | 0            | 0       |
| 02  | 0                  | 0            | 0                  | 0            | 0       |
| 03  | 8                  | 9            | 2                  | 2            | 110,000 |

Results

| Day | Result  | Value |
|-----|---------|-------|
| 00  | Average | 7,75  |
| 01  | Average | 0     |
| 02  | Average | 7,75  |
| 03  | Average | 0     |

## Determining the Premium Formula for the Period


## Determining the Premium Formula for the Period


1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Incentive Wages → Time Tickets → Maintain</i> |
| <b>Transaction Code</b> | PW01   |

2. Enter the following data:

| Field            | Data           |
|------------------|----------------|
| Personnel number | 1218           |
| Entry period     | Current period |

3. Choose .

If a dialog box appears while you are changing the entry period, choose .

4. Choose .


5. Enter the following data:

| Field           | Data |
|-----------------|------|
| Premium formula | 100  |

6. Choose .

7. Choose .

The premium formula has been assigned to the employee.

8. Choose  until the overview tree appears.

## Entering Time Tickets

### Use

In the following step of the process, enter a time ticket first and a premium time ticket afterwards.

### Procedure


1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Incentive Wages → Time Tickets → Record</i> |
| <b>Transaction Code</b> | PW03   |

2. Enter the following data:

| Field            | Data           |
|------------------|----------------|
| Personnel number | 1218           |
| Time ticket type | 04             |
| Entry period     | Current period |

3. Choose .

If a dialog box appears while you are changing the entry period, choose .

4. Choose .


5. Enter the following data:

| Field                | Data                                 |
|----------------------|--------------------------------------|
| Posting date         | 1. Working day of the current period |
| Labor time from - to | 22:30 to 05:45                       |

6. Choose .

The system issues a warning in the status bar.

7. Choose .

If an additional dialog box appears, choose .

The *Enter Time Wage Ticket* screen contains the default wage type *ML02* for the time ticket type "Time wage ticket" as well as the confirmed value *7.250* as the duration.

8. Choose .

The time ticket has been entered, and you can enter the next time ticket on the full screen.

9. Choose .


10. Enter the following data:


| Field | Data |
|-------|------|
|-------|------|

## Entering Time Tickets

|                  |    |
|------------------|----|
| Time ticket type | 01 |
|------------------|----|

You have changed the time ticket type.

11. Choose .

If a dialog box appears while you are changing the entry period, choose .

Instead of a time-based time ticket, you now see a premium-based time ticket.

12. Enter the following data:


| Field                      | Data                                 |
|----------------------------|--------------------------------------|
| Posting date               | 2. Working day of the current period |
| Premium formula            | 100                                  |
| Yield                      | 90                                   |
| Base quantity              | 10                                   |
| Labor time: Conf. value    | 8                                    |
| Labor time: Standard value | 1                                    |
| Setup time: Conf. value    | 2                                    |
| Setup time: Target value   | 2                                    |

13. Choose .

The following are determined: the *Labor time target value (9)* and the *result (110,000%)* = labor utilization rate). The *result* was calculated by applying the premium formula *target / actual with setup time*. In addition, the default wage type *ML01* for the time ticket type "Premium-based time ticket" is recorded in the time ticket.

14. Choose .

The time ticket has been entered, and you can enter the next time ticket on the full screen.

15. Choose  until the overview tree appears.



## Cumulations and Results in Individual Incentive Wages


1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Incentive Wages → Time Tickets → Maintain.</i> |
| <b>Transaction Code</b> | PW01  |

2. Enter the following data:

| Field            | Data           |
|------------------|----------------|
| Personnel number | 1218           |
| Entry period     | Current period |

3. Choose .

If a dialog box appears while you are changing the entry period, choose .

4. Choose .

5. Enter the following data:

| Field           | Data |
|-----------------|------|
| Premium formula | 100  |



The upper section of the cumulation window displays the cumulations for the whole period. The cumulations for each day are under days 01 to 31 (only if there are time tickets for the day). The example includes the first and second work day of the current period.

The values of time-based time tickets are not included in the standard cumulation; therefore, they do not influence the labor utilization rate of the individual days or that of the period.

6. Check the following entries:


| Field           | Data |
|-----------------|------|
| Premium formula | 100  |

7. Choose the *Result Types* tab page.



*Result* contains the employee's labor utilization rate as a percentage in the incentive wage types of the period specified. The column *Result type long text* contains the result type *Average*; the column *Value* contains the cumulated actual times of the time-based time ticket.

In the upper section of the tab page, *Result types* contain the cumulations for the entire period. The days 01 to 31 display the daily cumulations (only if there are time tickets for the day).

8. Choose  until the overview tree appears.

**Cumulations and Results in Individual Incentive Wages**

## Time Tickets in Payroll

### Purpose

In this process, you enter individual time tickets and then check these in the process step *Displaying Time Tickets in the Remuneration Statement*. The task of payroll is then to value the time tickets with a monetary amount. Sometimes you need to modify the time ticket result (for example, by capping or supplementing it). You display the resulting time tickets in the process step *Displaying Subsequent Time Tickets in the Remuneration Statement*.



To ensure that the data in the system for the employee Georg Spitz matches the data used below, only enter the values shown here. In particular, you should not enter any time data (infotypes and time tickets) for the previous months since this would alter the average monthly wage for the previous month.

You can find more information about this process under [i](#) [Page 116].

### Process Flow

You can find the data for this process under [?](#) [Page 117].

1. [Entering Time Tickets \[Page 120\]](#)
2. [Displaying the Time Tickets in the Remuneration Statement \[Page 123\]](#)
3. [Displaying the Subsequent Time Tickets in the Remuneration Statement \[Page 124\]](#)

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**Additional Process Information**

## Additional Process Information

The monetary incentive of a time ticket valuated in the master wage group is based on the performance-dependent variable elements. In the example of the supplemented premium time ticket, this is 2 hours (subsequently valuated with the master wage group). Wage type ML30 lists this wage element.

If a time ticket is valuated in a higher wage group than the master wage group, the monetary incentive is also calculated using the higher remuneration rate for the basic hours. The time-dependent variable element is displayed using wage type ML12 and the performance-dependent variable element is displayed using wage type ML32.

The wage type in the time wage ticket defines the average valuation as the valuation of the time ticket. This wage element is listed using wage type MLDU.

## Data Used During This Process

### Supplements

|                        | Values                   |                                |                                  |
|------------------------|--------------------------|--------------------------------|----------------------------------|
| Fields                 | Time Ticket Entry        | Form DL08 Original Time Ticket | Form DL09 Subsequent Time Ticket |
| Time ticket type       | 01 (Premium time ticket) |                                |                                  |
| Personnel number       | 1220 (Georg Spitz)       |                                |                                  |
| Month                  | 9                        |                                |                                  |
| Day                    | 22                       |                                |                                  |
| Master pay scale group | A04 (DM 23.34)           |                                |                                  |
| Wage type              | ML01 (piecework time)    |                                |                                  |
| Formula                | 000 (target/actual )     |                                |                                  |
| Labor time             | Confirmation value       | 8 (hours)                      | 8 (hours)                        |
|                        | Target value             | 6 (hours)                      |                                  |
| Labor utilization rate | 75%                      | 75%                            | 100%                             |
| Rate                   |                          |                                | DM 23.34                         |
| Amount                 |                          |                                | DM 186.72                        |

### Capping

|                  | Values            |                                |                                  |
|------------------|-------------------|--------------------------------|----------------------------------|
| Fields           | Time Ticket Entry | Form DL08 Original Time Ticket | Form DL09 Subsequent Time Ticket |
| Time ticket type | 01                |                                |                                  |
| Personnel number | 1220              |                                |                                  |
| Month            | 9                 |                                |                                  |

## Data Used During This Process

|                                |                                       |           |           |           |
|--------------------------------|---------------------------------------|-----------|-----------|-----------|
| Day                            | 22                                    |           |           |           |
| Master pay scale group         | A04                                   |           |           |           |
| Pay scale group in time ticket | A06 (DM 25.68)                        |           |           |           |
| Wage type                      | ML01                                  |           |           |           |
| Formula                        | 100 (target / actual with setup time) |           |           |           |
| Yield                          | 90 (units)                            |           |           |           |
| Control yield                  | 10 (units)                            |           |           |           |
| Labor time                     | Confirmation value                    | 6 (hours) | 6 (hours) | 6 (hours) |
|                                | Standard value                        | 1 (hours) |           |           |
|                                | Target value                          | 9 (hours) |           |           |
| Setup time                     | Confirmation value                    | 2 (hours) |           |           |
|                                | Target value                          | 3 (hours) |           |           |
| Labor utilization rate         | 150%                                  | 150%      | 140%      |           |
| Rate                           |                                       |           | DM 25.68  |           |
| Amount                         |                                       |           | DM 215.71 |           |

## Time wage

The hourly wage in the time wage takes into account the average of the last two months.

|                        | Values                |                                |                                  |
|------------------------|-----------------------|--------------------------------|----------------------------------|
| Fields                 | Entering Time Ticket  | Form DL08 Original Time Ticket | Form DL09 Subsequent Time Ticket |
| Time ticket type       | 04 (Time wage ticket) |                                |                                  |
| Personnel number       | 1220                  |                                |                                  |
| Month                  | 9                     |                                |                                  |
| Day                    | 22                    |                                |                                  |
| Master pay scale group | A04                   |                                |                                  |

Data Used During This Process

|            |                       |           |           |           |
|------------|-----------------------|-----------|-----------|-----------|
| Wage type  | ML02<br>(average)     |           |           |           |
| Labor time | Confirmation<br>value | 6 (hours) | 6 (hours) | 6 (hours) |
| Rate       | -                     | -         | DM 25.67  |           |
| Amount     | -                     | -         | DM 154.02 |           |

**Additional data**

The following list shows the individual wage elements cumulated for the period. If you have entered the *Capping*, *Supplement*, and *Time wage* time tickets as shown in the above example, you will find these wage elements in the list of *monthly totals per pay scale group – differences* in the payroll form for the subsequent time tickets.

| Wage type    | Actual time                | Amount |          |
|--------------|----------------------------|--------|----------|
|              | ML09 Master wage group -1  |        |          |
|              | ML10 Master wage group     | 8.00   | 0.00 DM  |
|              | ML11 Master wage group + 1 |        |          |
|              | ML12 Master wage group +2  | 6.00   | 14.04 DM |
| Time-        | ML13 Master wage group +3  |        |          |
| dependent    | ML14 Master wage group + 4 |        |          |
| variable     | ML15 Master wage group +5  |        |          |
| elements     | ML16 Master wage group +6  |        |          |
|              | ML17 Master wage group +7  |        |          |
|              | ML18 Master wage group +8  |        |          |
|              | ML19 Master wage group +9  |        |          |
|              | MLDU Average               | 6.00   | 13.98 DM |
|              | MLVZ Time-dep. total       | 20.00  | 28.02 DM |
|              |                            |        |          |
|              | ML29 Master wage group -1  |        |          |
|              | ML30 Master wage group     | 0.80   | 18.67 DM |
|              | ML31 Master wage group + 1 |        |          |
|              | ML32 Master wage group +2  | 2.40   | 61.63 DM |
| Performance- | ML33 Master wage group +3  |        |          |
| dependent    | ML34 Master wage group + 4 |        |          |
| variable     | ML35 Master wage group +5  |        |          |
| elements     | ML36 Master wage group +6  |        |          |
|              | ML37 Master wage group +7  |        |          |

**Entering Time Tickets**

|  |                             |      |            |
|--|-----------------------------|------|------------|
|  | ML38 Master wage group +8   |      |            |
|  | ML39 Master wage group +9   |      |            |
|  | MLVL performance-dep. total | 3.20 | 80.30 DM   |
|  |                             |      |            |
|  | Total gross amount          |      | 3826.22 DM |

**Entering Time Tickets**

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu path</b>        | <i>Human Resources → Time Management → Incentive Wages → Time Tickets → Record</i> |
| <b>Transaction code</b> | PW03   |

2. Enter the following data:

| Field            | Data               |
|------------------|--------------------|
| Personnel number | 1220               |
| Time ticket type | 01                 |
| Entry period     | Current month/year |

3. Choose .

If a dialog box appears when the period is changed, choose .

4. Choose .

5. On the *Record Premium time tickets* screen, make the following entries:

| Field                       | Data                            |
|-----------------------------|---------------------------------|
| Personnel number            | 1220                            |
| Posting date                | 1st work day/current month/year |
| Labor time: confirmed value | 8                               |
| Labor time: target value    | 6                               |




You have entered a premium time ticket with a very low labor utilization rate. This is supported with a personnel calculation rule for payroll.

6. Choose .

The system displays a warning.

7. Choose .

If an additional dialog box appears, choose .




Entering Time Tickets

The default wage type is placed in the time ticket and a percentage labor utilization rate is calculated using the standard premium formula 000.

8. Check the following data:

| Field     | Data               |
|-----------|--------------------|
| Wage type | ML01               |
| Result    | 75.000 (% LU rate) |

9. Choose .

The time ticket has been entered, and you can enter the next time ticket on the full screen.

10. Choose .


11. On the *Record Premium Time Ticket* screen, make the following entries:

| Field                       | Data                            |
|-----------------------------|---------------------------------|
| Personnel number            | 1220                            |
| Posting date                | 2nd work day/current month/year |
| Premium formula             | 100                             |
| Pay scale group             | A06                             |
| Yield                       | 90                              |
| Base quantity               | 10                              |
| Labor time: confirmed value | 6                               |
| Labor time: standard value  | 1                               |
| Setup time: confirmed value | 2                               |
| Setup time: target value    | 3                               |



You have entered a premium time ticket with a very high labor utilization rate. This is supported with a personnel calculation rule for payroll.

12. Choose .

If an additional dialog box appears, choose .


The default wage type is placed in the time ticket. The *Labor time: planned value* is also calculated together with a percentage labor utilization rate using the premium formula 100 (planned/actual with setup time).

13. Check the following data:

| Field                   | Data |
|-------------------------|------|
| Wage type               | ML01 |
| Labor time target value | 9    |

### Entering Time Tickets


|        |                     |
|--------|---------------------|
| Result | 150.000 (% LU rate) |
|--------|---------------------|

14. Choose .

The time ticket has been entered, and you can enter the next time ticket on the full screen.

15. Enter the following data:

| Field            | Data |
|------------------|------|
| Time ticket type | 04   |


16. Choose .


17. Choose .

The time ticket type has changed. A time wage ticket is ready for input.


18. Enter the following data:

| Field                       | Data                            |
|-----------------------------|---------------------------------|
| Personnel number            | 1220                            |
| Posting date                | 03. Work day/current month/year |
| Labor time: confirmed value | 6                               |

19. Choose .

If an additional dialog box appears, choose .

The time ticket has been entered, and you can enter the next time ticket on the full screen.

20. Choose  until the overview tree appears.

Displaying the Time Tickets in the Remuneration Statement

## Displaying the Time Tickets in the Remuneration Statement


1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu path</b>        | <i>Human Resources → Payroll → International → Payroll → Remuneration Statement</i> |
| <b>Transaction code</b> | PC00_M99_CEDT   |


2. Enter the following data:

| Field                         | Data                        |
|-------------------------------|-----------------------------|
| Payroll period – Payroll area | D1                          |
| Other period                  | Select current month/year   |
| Personnel number              | 1220                        |
| Selection - Payroll area      | D1                          |
| Form name                     | DL08 (Incentive wages data) |

3. Choose .

4. Choose .

A form is displayed showing the original time tickets you have entered in the current payroll period. On the first, second, and third of the month, you see the previously entered time tickets.

5. Choose  until the overview tree appears.

## Displaying Subsequent Time Tickets in the Remuneration Statement

### Displaying Subsequent Time Tickets in the Remuneration Statement

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu path</b>        | <i>Human Resources → Payroll → International → Payroll → Simulation</i> |
| <b>Transaction code</b> | PC00_M99_CALC_SIMU  |

2. Enter the following data:

| Field                                      | Data                           |
|--|--------------------------------|
| Payroll period – Payroll area              | D1                             |
| Other period                               | Select current month/year      |
| Personnel number                           | 1220                           |
| Selection - Payroll area                   | D1                             |
| Test run                                   | Select                         |
| Display log                                | Deselect                       |
| Display variant for remuneration statement | DL09 (Subsequent time tickets) |


3. Choose .

4. Choose .

5. Choose *Log*.

The *Display Log Tree* screen is displayed. Under *Statistics – Successful* you can see whether or not the test run was executed successfully.

Payroll is run in the simulation mode. This means no payroll results are updated. This is sufficient to view the subsequent time tickets. These are shown in the form after the payroll information.

6. Choose  until the overview tree appears.

In the *End Log Display* dialog box, choose  Yes.

## Reassignment to Wage Group and Wage Level

### Purpose

In order to demonstrate the 'reassignment to wage group and wage level' evaluations, you must first enter time tickets for one month. Payroll accounting must be carried out for the same month. Both evaluations are carried out after payroll accounting, providing a basis for the subsequent period.

### Process Flow

You can find the data for this process under [?](#) [Page 126].

1. [Displaying Personal work schedule \[Page 128\]](#)
2. [Entering Time-Based and Premium Time Tickets \[Page 129\]](#)
3. [Payroll Accounting \[Page 132\]](#)
4. [Reassigning Incentive Wage Earners \[Page 133\]](#)
5. [Reassigning Incentive Wage Earners to a Different Wage Level \[Page 135\]](#)

## Data Used During This Process

## Data Used During This Process

| Field   | Data   |
|---|--|
| Personnel number                                    | 01221 (Harald Stürmer)   |
| Period  | current month / year   |
| Person subgroup                                     | DK (Premium wage h)  |
| Payroll period - Payroll area                       | D1   |
| Payroll period - other period                       | Select, month / year   |
| Determine working time<br>- according to wage types | Select, 2 (total working hours in time wages or incentive wages according to wage types) |
| Employee subgroups for time wages                   | DI (hourly wage earners)   |
| Employee subgroups for incentive wages              | DK   |
| Wage types in time wages                            | ML02 (piecework average)   |
| Wage types in incentive wages                       | ML01 (piecework time)  |

## 04 (Time-related time ticket)

| Day                 | Confirmed value |
|---------------------|-----------------|
| 01                  | 6,25            |
| 02                  | 6,25            |
| 03                  | 6,25            |
| 04                  | 6,25            |
| 05                  | 6,25            |
| 06                  | 6,25            |
| 16                  | 7,75            |
| 17                  | 7,75            |
| 18                  | 7,75            |
| 19                  | 7,75            |
| 20                  | 7,75            |
| 21                  | 7,75            |
| Total in time wages | 84,00           |

## 01 (Premium time ticket)

| Day | Confirmed value | Yield | Standard | Pay scale group |
|-----|-----------------|-------|----------|-----------------|
|-----|-----------------|-------|----------|-----------------|

Data Used During This Process

|    |      |   |   |     |
|----|------|---|---|-----|
| 23 | 7,75 | 1 | 8 | A06 |
| 24 | 7,75 | 1 | 8 | A06 |
| 25 | 7,75 | 1 | 8 | A06 |
| 26 | 7,75 | 1 | 8 |     |
| 27 | 7,75 | 1 | 8 |     |
| 29 | 7,75 | 1 | 8 | A03 |
| 30 | 7,75 | 1 | 8 | A03 |

## Displaying Personal work schedule

### Displaying Personal work schedule

Before you start time leveling for incentive wage earners you have to check the periods of postable working shifts on the personal work schedule of the relevant employee. It doesn't make sense to post incentive wage time tickets on non-working shifts.

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Administration → Time Data → Display</i> |
| <b>Transaction Code</b> | PA51  |


2. On the *Display Time Data* screen, enter the following data:

| Field               | Data   |
|---------------------|--------|
| Personnel number    | 01221  |
| Period - Last month | Select |

3. Choose *Goto → Monthly calendar*.
4. Choose *Extras → Personal work schedule*.

The system displays the personal work schedule.

If you haven't installed a printer, open another session to continue with the procedure *Entering Time-Based and Premium Time-Tickets*. Switch immediately to the next procedure and use the work schedule list displayed in the first session instead of a print-out.

5. To print the actual work schedule, choose *List → Print*.
6. Select *Spool options - Print immediately*.
7. Choose *Continue*.
8. Choose  until the overview tree appears.



## Entering Time-Based and Premium Time Tickets

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Incentive wages → Time tickets → Record</i> |
| <b>Transaction Code</b> | PW03   |

2. Enter the following data:

| Field                 | Data                |
|-----------------------|---------------------|
| Personnel number      | 01221               |
| Time ticket type      | 04                  |
| Period - entry period | Month before / year |

3. Choose .

If a dialog box appears, confirm it.

4. Choose .

5. Based on the work schedule enter the following data:

| Posting date                     | PersRück |
|----------------------------------|----------|
| 1. Day of a night shift          | 6,25     |
| 2. Day of a night shift          | 6,25     |
| 3. Day of a night shift          | 6,25     |
| 4. Day of a night shift          | 6,25     |
| 5. Day of a night shift          | 6,25     |
| 6. Day of a night shift          | 6,25     |
| 1. Day of an early or late shift | 7,75     |
| 2. Day of an early or late shift | 7,75     |
| 3. Day of an early or late shift | 7,75     |
| 4. Day of an early or late shift | 7,75     |
| 5. Day of an early or late shift | 7,75     |
| 6. Day of an early or late shift | 7,75     |

6. Choose .

The system always uses the wage type ML02 for confirmed values for time-based time tickets.


7. Choose .

If a dialog box appears, confirm it.

8. Enter the following data:

## Entering Time-Based and Premium Time Tickets

| Field                 | Data                 |
|-----------------------|----------------------|
| Personnel number      | 01221                |
| Time ticket type      | 01                   |
| Period - entry period | Current month / year |

9. Choose .

10. Enter the following data:




Please note that the values in the Pay scale group column should be left-justified.

For the first entry choose the first day of an early or late shift following the last entered day above.

Note that you must enter premium time tickets with different pay scale groups.

Note that the data is exemplary. It's possible in your case, that the work schedule doesn't include two night shifts or the shifts don't take 6 days.


| Posting date                              | Actual labor | Yield | Standard Value | Pay Scale Group |
|---|--------------|-------|----------------|-----------------|
| 1. Day of an early or late shift          | 7,75         | 1     | 8              | A06             |
| 2. Day of an early or late shift          | 7,75         | 1     | 8              | A06             |
| 3. Day of an early or late shift          | 7,75         | 1     | 8              | A06             |
| 4. Day of an early or late shift          | 7,75         | 1     | 8              |                 |
| 5. Day of an early or late shift          | 7,75         | 1     | 8              |                 |
| 1. Day of a following early or late shift | 6,25         | 1     | 6              | A03             |
| 2. Day of a following early or late shift | 6,25         | 1     | 6              | A03             |

11. Choose .

The system always uses the wage type ML01 for confirmed values for premium time tickets.




If the result is less than 100%, the system displays a warning message in the status bar.

12. Confirm the warning message with .

13. Choose .

---

Entering Time-Based and Premium Time Tickets

14. Choose  until the overview tree appears.

## Payroll Accounting


## Payroll Accounting

1. Call up the transaction as follows:


|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Payroll → Europe → Germany → Payroll → Start payroll</i> |
| <b>Transaction Code</b> | PC00_M01_CALC   |

2. Enter the following data:

| Field                         | Data                        |
|-------------------------------|-----------------------------|
| Payroll period - payroll area | D1                          |
| Payroll period - other period | Select, month before / year |
| Selection - personnel number  | 01221                       |
| Selection - payroll area      | D1                          |
| Schema                        | D000                        |
| Display log                   | Deselect                    |

3. Choose .

You have run the payroll for your employee.

4. Choose  until the overview tree appears.

Reassigning Incentive Wage Earners and Time Wage Earners to Different Wage Groups

## Reassigning Incentive Wage Earners and Time Wage Earners to Different Wage Groups

### Use

If an incentive wage earner works principally in time wages, the system can propose a reassignment to an employee subgroup for time wage earners. You can check whether a time wage earner who repeatedly submits time tickets should be reassigned to the incentive wage earners.

Check whether Harald Stürmer should be assigned to another employee subgroup.

### Procedure

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Incentive Wages → Information System → Working Time → Working Times of Time- and Incentive Wage Earners</i> |
| <b>Transaction Code</b> | PW62   |

2. Enter the following data:

| Field  | Data                        |
|--|-----------------------------|
| Payroll period - payroll area                | D1                          |
| Payroll period - other period                | Select, month before / year |
| Selection - personnel number                 | 01221                       |
| Selection - payroll area                     | D1                          |
| Determine working time - based on wage types | Select                      |
| EE subgroups for time wages                  | DI                          |
| EE subgroups for inc. wages                  | DK                          |
| Wage types Time wages                        | ML02                        |
| Wage types Incentive wages                   | ML01                        |

3. Choose .

The figure in the 'Month' column is the total of all of the times documented through time tickets. You determined this by setting the parameter "Determine working time = 2" on the selection screen for the evaluation.



The system proposes reassigning your employee, who worked less than 50% in piecework, to time wages.


| Field                     | Data  |
|---------------------------|-------|
| Personnel number and name | 01221 |

**Reassigning Incentive Wage Earners and Time Wage Earners to Different Wage Groups**

|                                     |        |
|-------------------------------------|--------|
| Month                               | 135.25 |
| Activity                            | 51.25  |
| Time                                | 84.00  |
| % (percentage of time in piecework) | 37.89% |

Your employee worked 51.25 hours in piecework (wage type ML02). However, the majority of his working time, that is 84.00 hours, was in time wages (wage type ML01).

The system proposes a reassignment, but you have to carry out the actual event.

4. Choose  until the overview tree appears.

Reassigning Incentive Wage Earners to a Different Wage Level

## Reassigning Incentive Wage Earners to a Different Wage Level

### Use

If an incentive wage earner often works in a higher wage group, you could consider reassigning that employee to a higher level. The reassignment evaluation shows the wage groups in which the employee has worked and the percentage proportion of his time in these wage groups.

Check whether Harald Stürmer should be reassigned to a higher wage group.

### Procedure

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Incentive Wages → Information System → Working Time → Reassignment Proposals for Wage Groups</i> |
| <b>Transaction Code</b> | PW63  |

2. Enter the following data:

| Field                               | Data  |
|-------------------------------------|---|
| Payroll period - payroll area       | D1  |
| Payroll period - other period       | Select, month before / year                   |
| Selection - personnel number        | 01221   |
| Selection - payroll area            | D1  |
| Minimum percentage rate upgrading   | 65  |
| Minimum percentage rate downgrading | 50  |
| Divisor                             | 2 (Total times for all selected time tickets) |
| Always display                      | Select  |
| Wage types to be selected           | no entry                                      |



If the employee works more than 30% in piecework (ML01) in a higher wage group, the system proposes an upgrade. A downgrade is only proposed if the employee works 90% of the time in a lower wage group.

By selecting the *Display always* field, you ensure that the employee is displayed in all cases.

3. Choose .

The system proposes a reassignment since the employee has worked more than 30% of the time in a higher wage group.

| Field | Data |
|-------|------|
|-------|------|


**Reassigning Incentive Wage Earners to a Different Wage Level**

|                           |                 |
|---------------------------|-----------------|
| Personnel number and name | 01221           |
| Divisor                   | 135.25          |
| Wage group A03            | 12.50 or 9.24%  |
| Wage group A04            | 15.50 or 73.57% |
| Wage group A06            | 23.25 or 17.19% |



The divisor is the total actual time that the employee worked in piecework (ML01) during the selected period. Because he worked 30% of his time in a higher wage group, the system proposes upgrading him to wage group A06.

The system proposes a reassignment, but you have to carry out the actual event.

4. Choose  until the overview tree appears.



## Workflow for Travel Management

### Purpose

Both workflow processes demonstrate an approval and settlement process for Travel Management that is typical for Human Resources. The approval process outlined here is indicative of other workflow processes in Human Resources (see, for example, Leave Approval).

### Approving a Travel Request

An employee enters a travel request in the SAP R/3 system. It is automatically forwarded through the SAP R/3 system to a preset superior, who then checks the request.

The superior checks the travel request and then approves, rejects, or returns the request to the employee for corrections. The scenario for the process in this exercise is based on the assumption that superior approves the employee's request.

After the superior has approved the request, the employee receives an automatically generated mail with the approval message.

### Approving a Business Trip

After the business trip, the employee enters the trip facts in the R/3 system. The Expenses department then checks whether the employee's trip facts must be corrected or whether they are consistent. If the trip facts are consistent with the original request, they are forwarded to the superior to be checked for approval. The superior can then reject the reimbursement, send the trip facts back to the employee to be corrected, or, as in this scenario, approve the reimbursement of expenses. The results of trip costs accounting are transferred to payroll directly for payment during the payroll run.

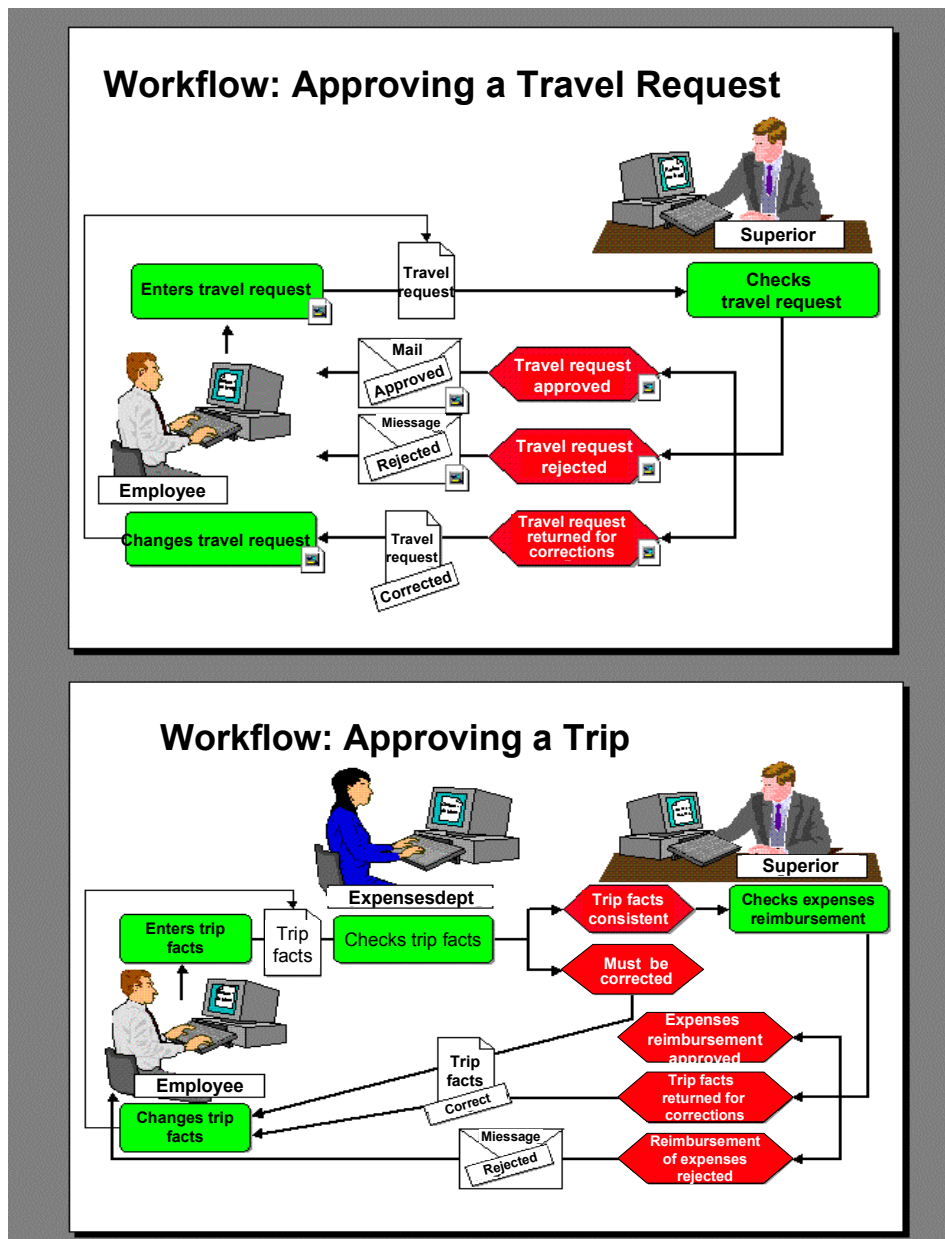
You can find more information about this process under [i](#) [Page 138].

### Process Flow

You can find the data about this process under [?](#) [Page 139].

1. [Entering a Travel Request \[Page 140\]](#)
2. [Approving a Travel Request \[Page 142\]](#)
3. [Displaying the Approval Notification for the Employee \[Page 143\]](#)
4. [Entering Trip Facts \[Page 144\]](#)
5. [Checking Trip Facts \[Page 146\]](#)
6. [Approving a Trip \[Page 147\]](#)
7. [Settling a Trip \[Page 148\]](#)

## Introduction



## Data Used During This Process

| Field    | Data   |
|----------|--|
| User     | <i>WF-TR-1</i><br>Employee: Chris Miller (personnel no.: 1309)<br>Submits a Travel Request                               |
| Password | welcome  |
| User     | <i>WF-TR-2</i><br>Superior: Dr. Martin Jost (personnel no.: 1027)<br>Checks the travel request and expense reimbursement |
| Password | welcome  |
| User     | <i>WF-TR-3</i><br>Administrator in the Expense Department:<br>Manfred Mannheim (personnel no.: 1052)<br>Checks trip data |
| Password | welcome  |

## Entering a Travel Request

## Entering a Travel Request

### Use

During this exercise, you will logon under various logon names. Ensure that you keep them open.



Under *System* → *Status* you can find out which logon the open work area belongs to.

### Procedure

1. Log on as the user **WF-TR-1** (Chris Miller PerNo: 1309) using the password **welcome**.
2. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Accounting</i> → <i>Financial Accounting</i> → <i>Travel Management</i> → <i>Travel Expenses</i> → <i>Travel Expense Manager</i> |
| <b>Transaction Code</b> | PR05  |

3. Enter the following data:

| Field         | Data |
|---------------|------|
| Personnel no. | 1309 |

You see a list of all trips that have already been entered.

4. Choose .

If the *Business Trip* dialog box appears, choose .

5. Enter the following data:

| Field  | Data             |
|--------|------------------|
| From   | 19.06.2000 10:00 |
| End    | 23.06.2000 18:00 |
| Reason | Trade fair       |
| City   | Berlin           |


6. Choose the *Advances* tab page.

If an additional dialog box appears, choose OK.



7. Enter the following data:

| Field    | Data       |
|----------|------------|
| Amount   | 1.000,-    |
| Currency | DEM        |
| CaOff    | Select     |
| Date     | 18.06.2000 |

## Entering a Travel Request

8. Choose  *Trip Status*.
9. Enter the following data in the *New Status* area:


| Field           | Data   |
|-----------------|--------|
| Request entered | Select |
| To be settled   | Select |

10. Choose .
11. Choose Yes in the dialog box that appears.
12. Choose .


---

**Approving a Travel Request**

## Approving a Travel Request

1. Log on as the user **WF-TR-2** (Dr. Martin Jost, personnel no.: 1027) using the password **welcome**.
2. Choose .
3. Choose *Inbox* → *Workflow*.
4. Select the travel request submitted by Chris Miller.
5. Double click on the *EX...(Executable)* field.

In the upper part of the screen, you can choose various buttons in order to approve a request, send the request back for corrections, or reject a request. In the bottom part of the screen, you see the details for the travel request.


6. In the *Approve Travel Request of Chris Miller* field: Choose *Approve Travel Request*.
7. Choose .

## Displaying the Approval Notification for the Employee

## Displaying the Approval Notification for the Employee

1. Log on as the user **WF-TR-1** (Chris Miller, personnel no.: 1309) using the password **welcome**.
2. Call up the transaction as follows:

|                         |                           |
|-------------------------|---------------------------|
| <b>Menu path</b>        | <i>Office → Workplace</i> |
| <b>Transaction code</b> | SBWP                      |

3. Choose *Inbox*.
4. Choose the approved travel request by double-clicking it.  
A personal message from your superior is displayed.
5. Choose  until the overview tree appears.

## Entering Trip Facts


## Entering Trip Facts

1. Log on as the user **WF-TR-1** (Chris Miller PerNo: 1309) using the password **welcome**.
2. Call up the transaction as follows:


|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Accounting → Financial Accounting → Travel Management → Travel Expenses → Travel Expense Manager</i> |
| <b>Transaction Code</b> | PR05  |

3. Enter the following data:

| Field         | Data |
|---------------|------|
| Personnel no. | 1309 |

4. Select the current trip.
5. Choose .
6. Choose the *Receipts* tab page.
7. In the *ExpTy (Expenses type)* field in the first line (001) of the receipts area, select the appropriate value by using the F4 help.
8. In the dialog box that appears, choose the entry for *HOTL* by double clicking *Hotel*.
9. On the *Receipts* tab page, enter the following data:

| Field    | Data |
|----------|------|
| Amount   | 790  |
| Currency | DEM  |

10. Choose .
11. Enter the following data in the dialog box:

| Field             | Data             |
|-------------------|------------------|
| From              | 19.06.2000       |
| To                | 23.06.2000       |
| Nbr of breakfasts | 4                |
| Description       | Holi_Inn         |
| Business purpose  | Enter any reason |
| Location          | Berlin           |
| Country           | DE               |
| Region            | Blank            |

12. Choose .

You have entered a hotel receipt from 06/19 - 06/23/2000. The receipt included 4 breakfasts.







The start date for the trip must be in the past in order to be valid for payroll.

13. Enter the following data:

| Expense type | Amount | Tax...(Tax ID) | Date |
|--------------|--------|----------------|------|
| TAXI         | 25,50  |                |      |
| TELE         | 15,00  | V1             |      |
| PARK         | 60,00  |                |      |

14. Choose .



To navigate between the individual fields, use the *Tab* key. It is easier to make all the entries first and then choose . This enable you to enter the trip data more quickly; the required checks occur only after you have made all entries.


15. Choose  *Trip Status*.

16. Assign a new status. Set the status to *Trip completed / Report recorded* and *To be settled*.

17. Choose .

18. Choose *Yes* in the dialog box that appears.



The new status is displayed in the *Approval* and *Settlement* fields.

19. Choose .



---

**Checking the Trip Facts**

## Checking the Trip Facts

1. Logon as user **WF-TR-3** (Manfred Mannheim, personnel no.: 1052) using the password **welcome**.
2. Choose .
3. Choose *Inbox* → *Workflow*.
4. Select Chris Miller's trip.
5. Double click on the *Ex...(Executable)* field.
6. Choose *Trip facts are consistent*.
7. Choose .

## Approving a Business Trip

1. Log on as the user **WF-TR-2** (Dr. Martin Jost, personnel no.: 1027) using the password **welcome**.
2. Choose .
3. Choose *Inbox* → *Workflow*.
4. Select Chris Miller's trip.
5. Double click on the *Ex...(Executable)* field.
6. To approve the expenses reimbursement, choose *Approve trip* from the subsequent screen.
7. Choose .

## Settling a Trip


## Settling a Trip

1. Logon as user **WF-TR-3** (Manfred Mannheim, personnel no.: 1052) using the password **welcome**.
2. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Accounting → Financial Accounting → Travel Management → Travel Expenses → Travel Expense Manager</i> |
| <b>Transaction Code</b> | PR05  |

3. Enter the following data:

| Field         | Data |
|---------------|------|
| Personnel no. | 1309 |

4. Choose .

In the *Approval* field, you see the new status *Trip approved / to be settled*.


5. Select the trip.


6. Choose .

7. Choose .

You can display a history of the approval statuses.

8. Choose  until the *Travel Expense Manager* screen appears.

9. Choose  *Settle*.

10. In the dialog box, choose .

11. Choose .

## Typical Work Process in Time Management

This script describes a typical work flow in SAP HR Time Management. In this scenario, times are recorded in a time recording system which is linked to the SAP System.

You can find more information about this process under [i](#) [Page 150].

### Process Flow

You can find the data for this process under [?](#) [Page 151].

1. [Displaying the Work Schedule and Checking Time Events \[Page 152\]](#)
2. [Displaying Time Events \[Page 154\]](#)
3. [Running Time Evaluation \[Page 156\]](#)
4. [Using Integrated Error Handling \[Page 157\]](#)

---

**Additional Process Information**

## Additional Process Information

Tasks are distributed between the SAP Time Management system and the time recording system as follows:

The time recording system handles time postings, such as "Clock-in", "Clock-out", "Off-site work". SAP Time Management uploads the time events, evaluates them, and, if required, sends the evaluated data back to the time recording system.

Because the SAP model company IDES is not connected to a time recording system, a generator for time events, "ZTIMECOP", was developed especially for customers who use IDES as a testing and training system.

The time events generator simulates the behavior of a time recording system and allows you to use the full Time Management functionality, without having to install interfaces to external systems.

## Data Used During This Process

| Field            | Data                            |
|------------------|---------------------------------|
| Personnel number | 1289 (Olaf Kerze)               |
| Period           | Current month/year              |
| Report           | ZTIMECOP (Time event generator) |

## Displaying the Work Schedule and Checking Time Events

# Displaying the Work Schedule and Checking Time Events

## Use

In this step, you deliberately create an error so that you can correct it in the next step. You must therefore ensure that no time events are entered for the last day of the last shift before the current date. You first have to access the employee's work schedule to find out this date. You then display the list of time events so that you can delete any time events that may have been entered for that date.


## Procedure

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Administration → Time Data → Maintain</i> |
| <b>Transaction Code</b> | PA61   |

2. Enter the following data:


| Field            | Data |
|------------------|------|
| Personnel number | 1289 |

3. Choose .
4. Choose the *Time management data* tab page.
5. Enter the following data:

| Field                | Data   |
|----------------------|--------|
| Planned Working Time | Select |
| Current month        | Select |

6. Choose  *Month*.

The *Change Monthly Calendar* screen is displayed.


7. Make a note of the date of the last shift before today's date.
8. Choose  until the *Maintain Time Data* screen appears.
9. Choose the *Working times* tab page.

10. Enter the following data:

| Field         | Data   |
|---------------|--------|
| Time events   | Select |
| Current month | Select |




11. Choose  *List entry*.

If the last date entered is before the date you noted, you have completed this step.

Choose  until the overview tree appears.



### Displaying the Work Schedule and Checking Time Events

If the date is *not* before the date you noted, select the last line of the time events list and choose . Repeat until the last date entered is before the date you noted and the last line contains a *Clock-out* as an entry. Choose  to save your changes, then choose  until the overview tree appears.



Ensure that you always delete time events as pairs (clock-in and clock-out together).



## Displaying Time Events

## Displaying Time Events

1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | <i>Human Resources → Time Management → Administration → Time Data → Display</i> |
| <b>Transaction Code</b> | PA51  |

2. On the *Working times* tab page, enter the following data:

| Field                 | Data   |
|-----------------------|--------|
| Personnel number      | 1289   |
| Time events           | Select |
| Period - current year | Select |

3. Choose .


The system displays the time events of personnel number 1289 for the whole of the current year.

4. Choose .

The dates of the last time event recorded for the current year is displayed in the last line.


5. Make a note of this date.
6. Choose *System → Services → Reporting*.
7. Enter the following data:

| Field   | Data     |
|---------|----------|
| Program | ZTIMECOP |

8. Choose .

9. Enter the following data:

| Field                     | Data  |
|---------------------------|---|
| Other period              | Select  |
| Field beside Other period | Date noted earlier in this step               |
| To                        | Date noted in the previous step minus one day |
| Personnel number          | 1289  |

10. Choose .

If the system issues a warning about data possibly being lost, choose Yes.



In this example, you generate time events only until the second-last day of the shift and subsequently run time evaluation. The system generates the error message *Employee not at work* for one day. You then process the error using Time Management's integrated error handling function.



This example illustrates the necessity of separating time recording and time evaluation.


The employee with personnel number 1289 is an industrial worker who works a rotating shift pattern: early, late, night. The last clock-out for the night shift is recorded on the following day. Time recording subsequently thinks that there are two postings that are not in the correct sequence on that day: first "Clock-out" and then "Clock-in".

Time evaluation can establish the correct logical relationship and assigns the clock-out to the previous day and the clock-in to the current day.



Note that time events can be generated only for employees whose *Time Management status* in the *Planned Working Time* infotype (0007) is 1. Employees who have a Time Management status other than 1 cannot be accounted using positive time management. Report ZTIMECOP issues an error message for any personnel numbers for which actual times are not recorded.

After the report has run, the system displays a list of all the time events generated.

11. Choose  until the overview tree appears.

## Running Time Evaluation


## Running Time Evaluation


1. Call up the transaction as follows:

|                         |   |
|-------------------------|---|
| <b>Menu Path</b>        | From the <i>Administration</i> node, choose <i>Time Evaluation</i> → <i>Time Evaluation</i> |
| <b>Transaction Code</b> | PT60  |

2. Enter the following data:

| Field                      | Data                       |
|----------------------------|----------------------------|
| Personnel number           | 1289                       |
| Forced recalculation as of | First day of current month |
| Evaluation up to           | Current date               |


3. Choose .

4. Choose .



The evaluation generates the error mentioned in the previous step; you will correct the error later by creating an absence through illness.

Time Evaluation has generated a planned pair to process any possible subsequent days posted, and has stored the error in Time Management.

5. Choose  until the overview tree appears.

Choose Yes on the dialog box that appears.



## Using Integrated Error Handling

1. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | From the <i>Administration</i> node, choose <i>Time Evaluation</i> → <i>Time Management Pool</i> |
| <b>Transaction Code</b> | PT40   |

2. Enter the following data:


| Field                        | Data |
|------------------------------|------|
| Selection - Personnel number | 1289 |

3. Choose .
4. In the *Time Management Pool* area, choose  *Error handling*.
5. Make the following entries on the *Date* dialog box:

| Field      | Data                       |
|------------|----------------------------|
| Notes from | First day of current month |


6. Choose *Continue*.

The *PDC Error Handling: Overview* screen appears.

If the *Time Management: Error Handling* screen appears, select the personnel number and choose .



You are now in Time Management's integrated error handling function. Time administrators/personnel administrators can control all time management functions from here.

7. Select the error message *Employee not at work*.
8. Choose .





The system displays: The error message *Planned pair generated*, the personal work schedule for the employee with personnel number 1289, the previous day's time events, and the last plausible time pair. The icon bar provides several error handling options: You can manually enter absences, such as leave or illness, and attendances, such as off-site work. You can maintain absence quotas, such as time-off entitlement, and manually accrue attendance quotas, such as approved overtime using overtime compensation type "Time off plus overtime rate".

9. Select the error message *Employee not at work*.
10. Choose *Absence*.
11. In the *Subtypes for infotype "Absences"* dialog box, double-click on subtype *0200 Illness with certificate*.

**Using Integrated Error Handling**


The *Create Absences* screen appears. The *From* and *To* fields already contain the correct day.

12. Choose .

13. Choose .

The *PDC Error Handling Overview* screen appears.

If the *PDC Error Handling Document View* screen appears, choose .

14. Choose .

Time evaluation is now run again to take account of the changes you made in error handling.

15. Choose .

16. Confirm the dialog box by choosing Yes.

In the *PDC Error Handling Overview* screen, the system displays the message *Employees w/o errors or those not evaluated*.

17. Choose .

The *Time Management pool* appears, where you can check the results of error handling.


18. In the *Balances* screen area, choose  *Time statement*.

The current month is the default period in the subsequent dialog box.

19. Choose *Continue*.

The system displays a time statement in color.

The header of the time statement list contains the employee's organizational data and the evaluation period of the current month. The individual results display the postings for the employee in the current month, the times recorded (start time and end time), the skeleton times, and the daily work schedules. Since the employee has no approved overtime, all fields in the *Overtime* column have the value 0.00. The error handling you carried out - *Sickness with certificate*, for which the skeleton times were credited according to the daily work schedule - is also displayed.

20. Choose  until the overview tree appears.

## Recruitment via Internet

### Purpose

In this process, an applicant applies via Internet for a vacant position at the IDES model company. The applicant uses an Internet interface to trigger the recruitment process in the R/3 System.

In the second part of the process, you consider the applicant's data from the point of view of the HR department.

You can find more information about this process under [i](#) [Page 160].

### Process Flow

You can find the data for this process under [?](#) [Page 161].

1. [Displaying Employment Opportunities in the Internet \[Page 163\]](#)
2. [Viewing Applicant Data \[Page 166\]](#)

---

**Additional Process Information****Additional Process Information**

The applicant wants to apply for a specific vacancy at the IDES model company. To increase his or her chances of being hired, the applicant uses the R/3 System to provide extensive information, such as personal data, education, qualifications, and current employment.



## Data Used During This Process

The name of the vacancy in this process is:

| Europe                      | North America               |
|-----------------------------|-----------------------------|
| Sales employee 3 Gr. 100-F1 | Clerk - Sales and Marketing |

Application form: *Personal Data*

| Field            | Europe             | North America      |
|------------------|--------------------|--------------------|
| Form of address  | Mr.                | Mr.                |
| First name       | Paul               | Paul               |
| Last name        | Gerhards           | Gerhards           |
| Date of birth    | 01.11.1970         | 11/01/1970         |
| Nationality      | English            | English            |
| Street           | Viktoriastrasse 45 | 424 Madison Avenue |
| Postal code      | 76135              | 700                |
| City             | Karlsruhe          | New York           |
| Country          | Germany            | USA                |
| Telephone number | 0123456789         | 0123456789         |

Application form: *Qualifications*

Figure 1

| Field         | Europe  | North America |
|---------------|---------|---------------|
| Qualification | Diploma | Diploma MBA   |
| Proficiency   | Good    | Good          |

Figure 2

| Field         | Europe           | North America    |
|---------------|------------------|------------------|
| Qualification | Marketing skills | Marketing skills |
| Proficiency   | Very good        | Good             |

Figure 3

| Field         | Europe            | North America        |
|---------------|-------------------|----------------------|
| Qualification | Leadership skills | Knowledge of English |
| Proficiency   | Good              | Fluent               |

Application form: *Education*

| Field | Europe     | North America |
|-------|------------|---------------|
| From  | April 1989 | April 1989    |

**Data Used During This Process**

|                           |                         |                             |
|---------------------------|-------------------------|-----------------------------|
| To                        | September 1994          | September 1994              |
| Educational establishment | University              | University                  |
| Institute/Location        | Mannheim University     | Mannheim University         |
| Country                   | Germany                 | Germany                     |
| Certificate               | Diploma                 | Diploma                     |
| Final mark                | Good                    | B                           |
| Branch of study 1         | Business administration | Business and Administration |

Application form: *Employer*

| <b>Field</b> | <b>Europe</b>  | <b>North America</b> |
|--------------|----------------|----------------------|
| From         | October 1994   | October 1994         |
| To           | April 2000     | April 2000           |
| Employer     | Siemens AG     | Siemens AG           |
| City         | Karlsruhe      | Karlsruhe            |
| Country      | Germany        | Germany              |
| Activity key | Sales employee | Sales employee       |

## Displaying Employment Opportunities in the Internet

1. Switch to your Internet Browser (for example, Netscape Navigator or Microsoft Internet Explorer).
2. Call up the *IDES Homepage*.



Your system administrator can tell you the Internet address of the *IDES Homepage*.

3. On the *IDES Homepage* choose *English*.



If you select language *English*, the R/3 System displays vacancies at IDES for all regions in North America. You can now select any of the Internet scenarios offered by IDES.

4. Choose *Business Customers*.
5. Choose *Job Opportunities* → *Online Application*.

The *Employment Opportunities* screen appears.



If you choose *Quit* in the header bar, the initial screen reappears. If you choose ? in particular situations, context-sensitive help appears.

6. In the left screen area, choose *Employment Opportunities* → *All regions* → *SD-CLERK* → *Clerk – Sales and Marketing*.
7. Select *Clerk – Sales and Marketing*.

A job description appears in the right screen area.

8. Choose *Apply*.

In the left screen area, you are asked whether you have applied before.

9. Choose *Germany* for the *Country* field.
10. Choose *Continue*.

An application form is displayed, with tab pages for *Personal Data*, *Qualifications*, *Education*, and *Previous employers*.

11. On the *Personal Data* tab page, enter the following data:

| Field           | Europe     |
|-----------------|------------|
| Form of address | Mr.        |
| First name      | Paul       |
| Last name       | Gerhards   |
| Date of birth   | 01.11.1970 |
| Nationality     | German     |

**Displaying Employment Opportunities in the Internet**

|                  |                    |
|------------------|--------------------|
| Street           | Viktoriastrasse 45 |
| Postal code      | 76135              |
| City             | Karlsruhe          |
| Country          | Germany            |
| Telephone number | 0123456789         |

12. Choose the *Qualifications* tab page.

13. Enter the following data:

| Field         | Europe           |
|---------------|------------------|
| Qualification | Marketing skills |
| Proficiency   | Very good        |

14. Choose *Next*.

15. Enter the following data:

16. Choose *Next*.

17. Enter the following data:

| Field         | Europe            |
|---------------|-------------------|
| Qualification | Leadership skills |
| Proficiency   | Good              |

18. Choose the *Education* tab page.

19. Enter the following data:

| Field              | Europe                  |
|--------------------|-------------------------|
| From               | April 1989              |
| To                 | September 1994          |
| School type        | University              |
| Institute/Location | Mannheim University     |
| Country            | Germany                 |
| Certificate        | Diploma                 |
| Final grade        | Good                    |
| Branch of study 1  | Business administration |

20. Choose the *Previous employers* tab page.

21. Enter the following data:

| Field | Data         |
|-------|--------------|
| From  | October 1994 |
| To    | April 1998   |

Displaying Employment Opportunities in the Internet

|          |            |
|----------|------------|
| Employer | Siemens AG |
| Location | Karlsruhe  |
| Country  | Germany    |
| Job      | Salesman   |

22. Choose *Send*.

On the *Confirmation* screen, you see your application number.

23. Make a note of your applicant number.

24. Enter the following data:

| Field                            | Data |
|----------------------------------|------|
| Please enter your new password   | IDES |
| Please confirm your new password | IDES |

25. Choose *Change password*.

A message appears informing you that the password has been changed.

26. Return to the *IDES Homepage*.

## Viewing Applicant Data


## Viewing Applicant Data

### Procedure

1. Log on to the *SAP R/3 System*.
2. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu Path</b>        | <i>Human Resources → Personnel Management → Recruitment → Appl. Master Data → Bulk Processing → Receipt of Application</i> |
| <b>Transaction Code</b> | PBA4   |


The *Applicants by Action* screen appears.

3. Choose .

A selection list entitled *Applicants by Action* is displayed.

4. Select *Paul Gerhards*, then choose *Short profile*.

You now see an evaluation of the data entered for this applicant.

5. Choose  until the overview tree appears.

## Application Status in the Internet

### Purpose

In this process, you check the status of your Internet application for the position of *Clerk – Sales and Marketing* IDES Inc.

To be able to carry out this process, you must have successfully completed the [Recruitment via Internet \[Page 159\]](#) process.

### Process Flow

You can find the data for this process under [?](#) [Page 168].

1. [Checking the Application Status Using the Internet \[Page 169\]](#)
2. [Editing the Application Status \[Page 170\]](#)

---

**Data Used During This Process****Data Used During This Process**

| Field                 | Data   |
|-----------------------|--|
| Your applicant number | As for <a href="#">Recruitment via Internet [Page 159]</a> |
| Your password         | As for <a href="#">Recruitment via Internet [Page 159]</a> |



## Checking the Application Status Using the Internet

1. Switch to your Internet Browser (for example, Netscape Navigator or Microsoft Internet Explorer).
2. Call up the *IDES Homepage*.



Your system administrator can tell you the Internet address of the *IDES Homepage*.

3. On the *IDES Homepage* choose *English*.
4. Choose *Business Customers*.
5. Choose *Job Opportunities* → *Application Status*.
6. Enter the following data on the *Application Status* screen:

| Field                 | Data   |
|-----------------------|--|
| Your applicant number | As for <a href="#">Recruitment via Internet [Page 159]</a> |
| Your password         | As for <a href="#">Recruitment via Internet [Page 159]</a> |

7. Choose *Continue*.

The system displays an overview of the status of your application.

8. To return to the *IDES Homepage*, choose *Back*.



## Editing the Application Status

## Editing the Application Status



### Procedure

1. Switch to your SAP R/3 System.
2. Call up the transaction as follows:

|                         |  |
|-------------------------|--|
| <b>Menu path</b>        | <i>Human Resources → Personnel Management → Recruitment → Appl. Master Data → Bulk Processing → Receipt of Application</i> |
| <b>Transaction code</b> | PBA4   |

3. On the *Applicants by Action* screen, choose .  
The system displays a list of all the applications received today.
4. Select your application.
5. Choose  *Overall status*.
6. On the *Change Overall status* dialog box, enter the following data:

| Field          | Data                             |
|----------------|----------------------------------|
| Overall status | 4 (Rejected)                     |
| Status reason  | 01 (Insufficient qualifications) |

7. Choose .  
If an additional dialog box appears, choose *Cancel*.
8. Choose  until the overview tree appears.



You can now repeat the step [Checking the Application Status in the Internet \[Page 169\]](#) to access the updated status of your application.



## Calendar of Events (Web User)

### Purpose

In this process we will demonstrate how Web users can view the current training offer in a calendar of events. In the following processes we demonstrate the additional opportunities for users to make or cancel event bookings themselves via intranet.

You do not require a user in the IDES System for the first process.

### Process Flow

You can find the data for this process under [?](#) [Page 172].

[Displaying the Calendar of Events \[Page 173\]](#)

---

**Data Used During This Process****Data Used During This Process**

| Field  | Data         |
|--------|--------------|
| Person | not required |

## Displaying the Calendar of Events

### Prerequisite

To carry out this process you must be working in an IDES System that is connected to an Internet Transaction Server (ITS).

### Procedure

27. Switch to your Internet Browser (for example, Netscape Navigator or Microsoft Internet Explorer).
28. Call up the *IDES Homepage*.



Your system administrator can tell you the Internet address of the *IDES Homepage*.

29. On the *IDES Homepage* choose *English*.
30. Choose *Business Customers*.
31. Choose *Training Calendar* → *Catalog of Events*.
32. Enter the following data:

| Field    | Data                 |
|----------|----------------------|
| Start    | Current date         |
| End      | 31. 12. current year |
| Language | German               |

33. Choose *Find*.
34. Select *IDES Training*.

The various business event types offered in IDES Training are displayed for selection.

35. Click  beside the selected business event type.

General information concerning the event such as a description of the contents is displayed.

36. Go to the *General info* tab page.

Here you find information about the organizers, the start and end dates of the event.



The tab pages *Price* and *Prerequisites and Qualifications* contain further information.


37. Choose *Back*.
38. Under *Business event types* select *Human Resources Overview*.

In the lower part of the screen, specific dates scheduled for the selected event type are proposed.

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**Displaying the Calendar of Events**

Information is displayed about the start, end, and event location as well as about the maximum capacity and the current status of bookings.

39. In the lower part of the screen, click  beside the required event date.
40. Go to the *Schedule* tab page to view the detailed schedule of the event.
41. Continue choosing *Back* on your browser until you return to the *IDES Homepage*.

## Booked Events

### Purpose

In this process we will demonstrate the opportunities for users to inform themselves on the intranet about events for which they are booked and the status of their bookings.

To simplify the process, we assume the following prerequisites:

- You carried out the process *Book Attendance* and have not canceled any bookings.

### Process Flow

You can find the data for this process under [?](#) [Page 176].

[Displaying Booked Events \[Page 177\]](#)

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**Data Used During This Process****Data Used During This Process**

| Field  | Data                                     |
|--------|--|
| Person | Hannelore Elsner (Personnel number 1046) |



## Displaying Booked Events

### Prerequisite

To carry out this process you must be working in an IDES System that is connected to an Internet Transaction Server (ITS).

### Procedure

1. Switch to your Internet Browser (for example, Netscape Navigator or Microsoft Internet Explorer).
2. Call up the *IDES Homepage*.



Your system administrator can tell you the Internet address of the *IDES Homepage*.

3. On the *IDES Homepage* choose *English*.
4. Choose *Business Customers*.
5. Choose *Training Calendar* and *Booked Events Overview*.
6. Enter the following data:


| Field         | Data    |
|---------------|---------|
| Attendee      | 1046    |
| Attendee Type | Person  |
| Password      | welcome |

7. Choose *Logon*.
8. Enter the following data:

| Field | Data                 |
|-------|----------------------|
| Start | Current date         |
| End   | 31. 12. current year |

9. Choose *Choose*.

The events for which Hannelore Elsner is booked in the period specified are displayed under *Bookings for Hannelore Elsner*.

10. To display a detailed description of the event contents, choose .
11. Choose *Back*.
12. Continue choosing *Back* on your browser until you return to the *IDES Homepage*.

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**Attendance Cancellation**

## Attendance Cancellation

### Purpose

In this process we will demonstrate the opportunities for Web users to cancel a booking for an event.

To simplify the process, we assume the following prerequisites:

- You carried out the process *Book Attendance* and have not canceled any bookings.

### Process Flow

You can find the data about this process under [\[Page 179\]](#).

[Canceling Attendance \[Page 180\]](#)

## Data Used During This Process

| Field  | Data                                     |
|--------|--|
| Person | Hannelore Elsner (Personnel number 1046) |

## Canceling Attendance

## Canceling Attendance

### Prerequisite

To carry out this process you must be working in an IDES System that is connected to a Internet Transaction Server (ITS).

### Procedure

1. Switch to your Internet Browser (for example, Netscape Navigator or Microsoft Internet Explorer).
2. Call up the *IDES Homepage*.



Your system administrator can tell you the Internet address of the *IDES Homepage*.

3. On the *IDES Homepage* choose *English*.
4. Choose *Business Customers*.
5. Choose *Training Calendar* → *Canceling Attendance*.
6. You make the following entries on the *Cancel Attendance* screen:


| Field         | Data    |
|---------------|---------|
| Attendee      | 1046    |
| Attendee Type | Person  |
| Password      | welcome |

7. Choose *Logon*.
8. Enter the following data:

| Field | Data               |
|-------|--------------------|
| Start | Current date       |
| End   | 31.12.current year |

9. Choose *Choose*.

The events for which Hannelore Elsner is booked are displayed under *Bookings for Hannelore Elsner*.

10. To cancel her booking, choose .

A message informing you that you are about to cancel this event booking appears.

11. Choose *Confirm*.

A message appears informing you that the booking has been canceled.

12. Continue choosing *Back* on your browser until you return to the *IDES Homepage*.