Personnel Administration (PA-PA)

HELP.PAPA

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Icons

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Purpose

In times of increasing decentralization and the globalization of markets, a central and constantly accessible administration for personnel data is becoming an increasingly decisive advantage.

You can manage all modern personnel administration tasks with this application component. *Personnel Administration* relieves you from from the daily administrative routine activities which are costly and time consuming, while simultaneously supporting you in demanding planning activities.

Another advantage of this application component - especially for international corporations - is the various country specific versions which are created in accordance with the respective country specific features. By using country specific versions, you can set up *Personnel Administration* as a standard personnel administration system in different countries.

Integration

With other HR Application Components

***Personnel Administration* is completely integrated in the Human Resources component of the SAP System. If you require additional functions to those offered by *Personnel Administration*, you will need to set up the following application components:**

Desired Function	Required Application Component
Transfer applicant data when hired to *Personnel Administration*.	Recruitment [Ext.]
Automatically incorporate new employees in the organizational structure of the company	Organizational Structure [Ext.]
Transfer employee compensation directly to the employees' payment	Compensation Management [Ext.]
Trigger transfer from Personnel Development	Personnel Development [Ext.]

Features

Using this application component, you can enter and process employee-related data within your company. *Personnel Administration* automatically checks all data as it is entered to ensure that it is plausible. All employee-related data is logged with the exact date. Data remains transparent in your time progression at all times, and creates the basis for sound personnel decisions.

The following personnel administration functions are available in *Personnel Administration*:

- You can store all types of information about an employee in Human Resources Infotypes. [Page 43] They provide information with a structure, facilitate data entry, and enable you to store data for specific periods.
- Basic personnel procedures within master data administration, such as hiring employees, performing organizational reassignments, and entering the data required for employees who leave the enterprise, are represented by separate personnel actions [Page 153]. Each personnel action contains the infotypes for which data must be entered in regard to the action in question, and displays them sequentially for you to process. You can use the personnel action fast entry for specific personnel actions, thus making data entry even quicker. When

using the personnel action fast entry function, you are presented with a view in which only the input fields where you must enter data for the selected personnel action are displayed.

- If you make a change to the personnel data of an infotype which then has an effect on the data of a second infotype, the SAP System automatically displays the second infotype. These dynamic actions [Page 176] are triggered automatically by the SAP System and guarantee consistent data retention at all times. Dynamic actions assist you with many human resource processes which lead onto further activities.
- The Master Data Fast Entry [Page 208] reduces the amount of time needed to enter bulk data into the system. The master data fast entry is used to process personnel data in the same infotype for many employees simultaneously. When using the master data fast entry, you are presented with a view in which only the input fields where you must enter data for the employees selected are displayed.
- Reporting plays an essential role in human resources data. There are numerous standard reports [Page 375] available so that you are able to evaluate the multitude of data managed in your company.
- You can scan in and archive original documents, for example work contracts, appraisals or employee photographs using Document Archiving [Page 422]. As time goes on, you can centrally administer an increasing number of personnel files, thus saving costs and time.
- If you have data which is no longer required in the system, yet should be retained and be available for evaluation, you can remove it from the database using Data Archiving [Page 443]. Long-term documents from the creation of infotype logs can be archived in *Personnel Administration*.
- Workflow Management [Page 506] accelerates processing and the flow of information in personnel administration by coordinating and monitoring the flow of business processes step by step. SAP Business Workflow automates, for example, the *Subsequent Activities of a New Hiring* in *Personnel Administration*.
- Application Link Enabling (ALE) [Page 437] enables the distribution of business management processes and functions to many loosely linked SAP Systems. Amongst other things, the ALE business process *Sales Employee* is available in *Personnel Administration*.
- Employee Self-Service [Ext.] (ESS) allows employees to create, display, and change their own data in the company's intranet. In *Personnel Administration*, for example, employees can use the *Personal Data* service to create and edit their own personal data. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

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Working with the Object Manager

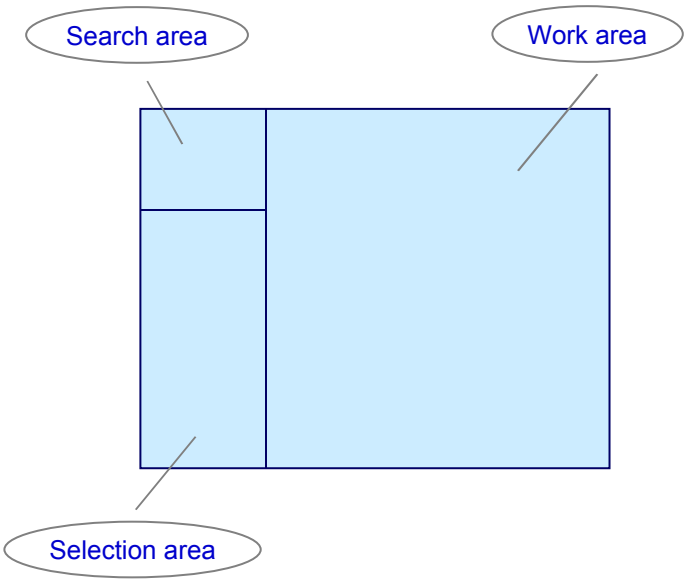
Purpose

The object manager provides you with an easy and user-friendly method of finding and selecting objects over various transactions and components.

In *Personnal Administration*, you use the object manager to find employees whose data you want to display or edit. The object manager is connected to the following transactions:

- *Display HR Master Data* (PA20)
- *Maintain HR Master Data* (PA30)
- *Personnel Actions* (PA40)

The user interface for these transactions is divided into various screen areas, each of which contains specific functions:



Together, the *search area* and the *selection area* form the object manager. You perform the transaction-specific functions for the selected employees in the *work area.*

Every time you execute a transaction, an updated list is displayed in the *selection area*, according to the search criteria. This also applies if you have saved a search as a favorite.

Process Flow

The following are steps involved in a typical process:

1. In the *search area,* you search [Page 20] for one or more employees whose data you want to display or edit.
2. The selected employees are listed in the *selection area.* You double-click on an employee to display him or her in the *work area.*
3. You perform the transaction-specific functions and carry out personnel actions for the selected employee in the *work area.*

See also:

Using Search Functions [Page 21]

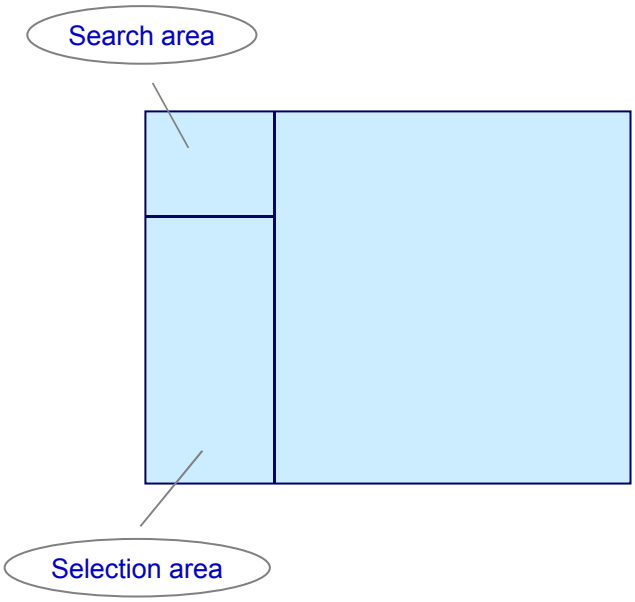
Object Manager

Use

You can use the object manager to find and select objects that you want to display or edit. In *Personnel Administration*, you can search in particular for the *Employee* object type

Features

The object manager comprises a *search area* and a *selection area*.



- The *search area* contains several search functions for the object type *Employee* , such as the *search term* and *free search* functions. The search functions are identified with a . A search function can also be incorporated into the object type. The *Employee* object type is identified with a .

  If required, you can customize the object manager to include additional search functions. You can also change the sequence of the search functions. For more information, see the Implementation Guide by choosing *Personnel Management* → *Global Settings in Personnel Management* → *Settings for Object Manager*.

- You can create *search variants* in the search area if you want to be able to reuse search criteria or hitlists. The search variants are identified with a .
- The *selection area* displays the employees you searched for and the employees found. They are displayed in a hitlist or in a structure, depending on the search function used.

- You can scroll through the previous search results in the selection area using and .
- You can show or hide the object manager completely, by choosing *Settings* → *Show object manager* or *Hide object manager*. The screen areas become larger or smaller accordingly.
- You can use to enlarge or reduce the selection area to display more hits. The search area is then shown or hidden accordingly.

The settings last used for the size of the screen areas and the last object selection are saved for each user and are available again the next time the user accesses the transaction.

You can use the *Delete User Settings for Object Manager* report (RH_DELETE_OM_USER_SETTINGS) to reset the settings and the last object selection. Please note that the report applies to all applications for one user. For more information, see the report documentation.

Finding/Selecting Objects

Use

In the **Search area** you can search for one or more objects that you want to display or edit.

For each object type there are various **search functions**, for example:

- Search Term
- Structural Search
- Free Search

Prerequisites

Objects you are searching for must already exist. Create new objects as required.

The required object types and search functions are set up.

Procedure

1. In the **search area** select one of the available search functions and if necessary enter the required selection criteria.

   In the **selection area** the system displays all found objects with the corresponding object type, either as a list or as a structure.

2. Double-click on the required object.

Using Search Functions

Use

The search functions provided for the *Employee* object type enable you to search for employees in various ways.

The search functions are identified with a . A search function can also be incorporated into the *Employee* object type. The *Employee* object type is identified with a .

Procedure

Searching for employees using the collective search help

1. Choose *Collective search help*.

   A dialog box appears, displaying a number of elementary search helps (*Organizational Assignment*, for example).

2. Enter your search in one of the fields available for an elementary search help. You can also make masked entries (such as M+++er) or generic entries (such as M*).

3. Choose .

   The search result is displayed in the *selection area*; the display in the overview and detail areas remains unchanged.

4. If required, you can search for more employees, and add the employees found to the *selection area* by choosing *Insert*.

5. Double-click on the required employee in the *selection area*.

   The selected employee is displayed in the *work area*. You can start to edit the employee data.

Searching for employees using a search term

1. Choose *Search term* (or *Employees* if this object type relates to the function).

   The *Find Employees* dialog box appears.

2. Enter the relevant personnel number or last name. You can also make masked entries (such as M+++er) or generic entries (such as M*).

3. Choose *Find.*

   The search result is displayed in the *selection area*; the display in the overview and detail areas remains unchanged.

4. If required, you can search for more employees, and add the employees found to the *selection area* by choosing *Insert*.

   Double-click on the required employee in the *selection area*. You can start to edit the employee data.

Searching for employees using the free search

The *free search* function uses the *InfoSetQuery*.

Using Search Functions

1. Choose *Free search.*

   The *Determine Objects of Type Employee* dialog box appears. For more information, see Selection [Ext.]. When the search is complete, the search result is displayed in the *selection area*.

   Double-click on the required employee in the *selection area*. You can start to edit the employee data.

Using Search Variants

Use

In some search functions, for example *Search Term*, you can restrict the number of hits by using a combination of selection criteria. You can then save such a combination as a **search variant** so that you can use it again. You can also delete a search variant again, if necessary.

Procedure

Creating Search Variants

1. Use one of the search functions to search for objects.

   The system displays the hits in the **selection area**.

2. Choose and enter a name. Choose .

   The system saves the search criteria as a search variant and assigns them to the corresponding object type in the **search area.** The search variant is marked with .

3. Select the search variant you created and choose . You can check your search criteria.

Searching for Objects Using a Search Variant

1. Select a search variant.

   The hits are displayed in the **selection area**.

2. Double-click on the required object.

Deleting Search Variants

1. Select the search variant that you want to delete.
2. Choose .

   The search variant is deleted.

Configuring Columns

Use

You can decide which columns should be displayed in different screen areas.

Prerequisites

The columns that are available are determined in Customizing. For further information see the Implementation Guide (IMG) under *Personnel Management* → *Global Settings in Personnel Management* → *Column Framework* or the IMG for *Organizational Management*.

Procedure

1. Choose .

   The *Column configuration* dialog box appears.

2. Select the columns that you want to display.

   Some entries represent column groups, that is, more than one column will be displayed if you select one of these entries.

3. Confirm your entries by choosing .

Result

The columns you selected are displayed.

You can reset all of a user's column configurations using the report RH_DELETE_COL_USER_SETTINGS. Note that the reset takes place across all applications. For more information, see the report documentation.

Basic Objects and Structures in Personnel Administration

Personnel administration is traditionally characterized by numerous individual pieces of information, which must be stored, updated, and evaluated for each employee.

An effective modern Human Resources Management system must therefore be able to meet many requirements.

What Do You Require of an HR Management System?

Organizational assignment

- A Human Resource Management system must be able to depict the organizational hierarchies and relationships between employees.
- Flexible planning and the setting up of human resources subareas at the different organizational levels are also necessary. These subareas include:
  - Enterprise structure
  - Personnel structure
  - Pay scale structure
  - Wage types
  - User authorizations

Creation and Maintenance of HR Data

- A Human Resource Management system should enable the creation and administration of employee data.
- To ensure that data is consistent and accurate, all employee-specific data should be automatically checked against a set of current values.
- Default values also help you with the task of entering and maintaining data.

Reporting

- HR reporting should be flexible and should take into account all aspects of the organizational structure of the enterprise.

Personnel Administration Activities

Organizational Assignments

In *Personnel Administration*, organizational hierarchies describe the subdivision of a group into company codes, personnel areas, and personnel subareas. The *Organizational Management* component allows you to make further subdivisions, for example, into groups, subgroups, projects.

In *Personnel Administration*, organizational hierarchies and their control functions are reproduced using a system of control tables. The control tables allow you to set up an enterprise structure and a personnel structure that are independent of each other.

Basic Objects and Structures in Personnel Administration

You can differentiate between enterprise and personnel structures by allocating different groupings or combine them by allocating the same groupings. You define the time, pay scale, and wage type structures within these groupings. This ensures that the conditions stored in the time, pay scale, and wage type structures apply to all of the employees assigned to the same enterprise and personnel structure.

Creation and Maintenance of HR Data

You can create and store all types of information about an employee in *Personnel Administration.* This component enables you to organize the personnel administration function in your company in line with your company's specific requirements.

Evaluation of HR Data

You can run reporting in *Personnel Administration* using any of the units included in the organizational structure as selection criteria.

See also:

Organizational Assignment in Personnel Administration [Page 27]

Data Structures in Personnel Administration [Page 42]

Organizational Assignment in Personnel Administration

In *Personnel Administration*, organizational assignments are made in the following areas:

- The Enterprise Structure [Page 28]
- The Personnel Structure [Page 33]
- The Pay Scale Structure [Page 39]
- Wage Types [Ext.]

In this section, you learn about the

- Elements that make up the individual subareas
- Functions performed by the various elements within a subarea
- Interrelationships between the elements of one or several subareas

Enterprise Structure

Definition

Structure of company according to personnel administrative, time management and payroll perspectives from the point of view of your own company

The company structure describes elements of the company and there dependencies.

Structure

The enterprise structure in *Personnel Administration* consists of the following:

- *Client*

  The client is, in accordance with commercial law, an organizational and data technical isolated unit within the R/3 System, with separate master records and its own separate record of tables. A client's area of jurisdiction can correspond to a unit as small as a company, or as large as an entire enterprise.

- *Company code*

  The company code is the smallest organizational unit of external accounting in which a complete and isolated financial accounting can be created. All events that affect the company code and the creation of all statements for a legal financial statement, for example balances, profit and loss calculation are contained within the company code organizational units.

- *Personnel area*

  The personnel area is an organizational unit; according to a personnel administrative, time management and payroll organizational point of view, a personnel area represents a delimited enterprise area. The personnel area is only used in *Personnel Administration* and is unique within a client.

  Personnel areas are sub-divided into personnel subareas. Organizational data and guidelines as how to assign it, are stored on a personnel area and personnel subarea level. The rules and guidelines could be of a legal, pay scale and collective agreement, or internal nature. A personnel area is assigned to a company code which has the financial accounting values that are relevant for the personnel area. A pay scale area, a pay scale type and a public holiday calendar are precisely defined for a personnel subarea.

  The personnel area in a software company can be subdivided into development, training and administration personnel subareas.

- *Personnel subarea*

  The personnel subarea is only used in *Personnel Administration*. The groupings linked to the personnel subarea determine which entries from the subsequent screen are allowed for an employee of a particular company code/personnel area.

  Groupings are used for validation of master and time data. Groupings are also used to check the plausibility of data that you enter.

- *Organizational key*

  The organizational key enables you to define the organizational assignment more exactly. The organizational key can consist of elements from the enterprise structure and personnel structure.

If you require further information on the corporate structure, please see the Elements of the Enterprise Structure [Page 30] section.

Integration

The *Hiring* personnel action enables you to assign employees to the enterprise structure. The data is stored in the Organizational Assignment [Page 65] (0001) infotype. This infotype is essential for authorization checks.

Elements of the Enterprise Structure

The enterprise structure consists of the following elements:

Client

R/3 System clients have an independent status both in legal and organizational terms. The clients within the system can be distinguished by a three-character, alpha-numeric code and are defined in Customizing.

When your R/3 System is installed, it is set up with two clients:

- *Client 000*

  Client 000 is the SAP standard client. The SAP original system is held in this client. Client 000 contains default values for all tables. SAP updates the default values with every system upgrade and release upgrade.

  You are **not** allowed to work in this client.

- *Client 001*

  The content of this client is the same as the 000 client. You can do your customizing in this client in order to adjust the standard system to your requirements.

Clients are a technical structural feature of an R/3 system. The system makes a distinction between client-independent and client-dependent elements. Client-independent elements are objects that are used in all clients. Client-specific elements are objects that are only used in a specific client.

The following objects are defined as client-independent:

- data structures, such as field definitions, table structures, and file set-ups
- client-independent tables
- transactions
- programs
- Standard reporting
- Authorization objects
- SAP Library

The following objects are defined as client-dependent:

- client-specific tables that must be copied from the original client, that is, client 000
- HR master records
- user master records
- Authorization profiles
- customer-specific programs

The following factors must be taken into consideration when you decide whether or not to create a client:

- You have to adapt the system client-specifically to the enterprise structure.
- You cannot access personnel data in other clients. Each client's personnel data is protected from unauthorized access.
- You cannot perform reporting across all clients, and you cannot receive or assign client-independent access authorizations.
- You cannot exchange data between clients.
- If an employee moves between two clients, you must assign him or her a new personnel number.

Company Code

Within a client, the company code represents the highest level of the enterprise structure. In Customizing, the company code is defined by a four-character, alpha-numeric code.

If the *Controlling*, *Financial Accounting*, *Materials Management* or *Sales and Distribution* application components are set up in addition to the *Personnel Administration* component, you must set up the company code so that it also meets their requirements. This is not tantamount to a restriction: You define all of the HR System's most important control data at the level of the personnel subareas, and these levels belong to *Personnel Administration*.

In *Personnel Administration*, the company code has the following control functions:

- The company code is used to generate default values for data entry, for example, an employee's payroll area.
- The company code is a selection criterion for reporting.
- The company code constitutes an authorization check unit.

At the company code level, the following control features are assigned which are relevant for *Personnel Administration*:

- the default country key for the employee's personal data, address data, and bank data.
- a default value for the currency key for employee's basic pay.
- a language code for text output, for example, employee remuneration information.

This language code is not the same as the logon language, which determines the language used in the on-line system.

Personnel Area

Personnel areas divide a company code into sub-units. The individual personnel areas in a company code are defined in Customizing and have a four-digit alpha-numeric identifier.

The personnel area has the following functions:

- The personnel area is used to generate default values for data entry, for example, an employee's payroll area.
- The personnel area is a selection criterion for reporting.

- The personnel area constitutes an authorization check unit.

Personnel Subarea

Personnel subareas are a subdivision of the personnel area. Organizational control of the main HR subareas, namely the pay scale and wage type structures and work schedule planning, takes place at the personnel subarea level. In Customizing, the personnel subarea is defined by a four-character, alpha-numeric code. The respective country-specific control features are stored here.

The personnel subarea has the following organizational functions:

- Specifying the country grouping; this controls the dialog for entering country-specific personnel data and the setting up and processing of wage types and pay scale groups in *Payroll*; within a company code, the country grouping must be unambiguous
- Assigning a legal entity to differentiate between the individual companies from a legal point of view
- It specifies groupings for *Time Management*. This enables you, for example, to set up work schedules, substitution types, absence types, and leave types on the basis of a specific personnel subarea.
- The personnel subarea is a selection criterion for evaluations.
- The personnel subarea is used to generate default values for pay scale area and pay scale type for an employee's basic pay.
- It specifies the public holiday calendar.
- Defining personnel subarea-specific wage types per personnel area
- It assigns a legal person for payroll.

Organizational Key

The organizational key improves the enterprise structure and the personnel structure. You can use an organizational key to carry out a further organizational assignment for employees. The elements company code, personnel area and personnel subarea from the company structure, help to make up the organizational key. The organizational key is a part of the authorization check. If you require further information on the organizational key, please see the Personnel Structure from the Administrative Perspective [Page 34] section.

Personnel Structure

Definition

Describes an employee's position in a company from the individual employee's view.

Structure

The personnel structure can be considered from two perspectives:

- administrative perspective
- organizational perspective

The administrative personnel structure [Page 34] consists of the following elements:

- *Employee group*
- *Employee subgroup*
- *Payroll area*
- *Organizational key*

The extent of the distinction that you make between employee groups and employee subgroups depends on your evaluation and access protection requirements.

The organizational key consists of a part of both the enterprise structure and the personnel structure. The elements employee group and employee subgroup could also be relevant in forming the organizational key.

The organizational personnel structure [Page 37] consists of the following elements:

- *Position*
- *Job*
- *Organizational unit*

Integration

To assign an employee to the personnel structure, use the *Hiring* personnel action. The data is stored in the Organizational Assignment [Page 65] (0001) infotype. This infotype is essential for authorization checks.

The Personnel Structure from the Administrative Perspective

The administrative personnel structure is defined by the following elements:

Employee group

Employee groups represent a primary subdivision of personnel. An employee group defines the extent to which its employees place their labor at the disposal of the enterprise. The *Personnel Administration* component makes a significant differentiation between active, pensioner and early retiree employee groups. In Customizing, each employee group is defined with a one-digit identification.

The employee group has the following organizational functions:

- Employee groups allow you to generate data entry default values, for example, for the payroll accounting area or an employee's basic pay.
- Employee groups serve as selection criteria for reporting.
- Employee groups constitute an authorization check unit.

The standard system contains a few specimen employee groups. You can copy the employee groups that are delivered or if necessary adjust them to your company specific needs.

Employee subgroup

Employee subgroups subdivide employee groups. Within the employee group for active employees, for example, a distinction is made between the following employee subgroups:

- Hourly wage earners
- Monthly wage earners
- Pay scale employees
- Non-pay scale employees

In Customizing, the employee subgroup is defined by a two-character, alpha-numeric code.

All of the control features for the personnel structure are defined at the employee subgroup level. The most important control features are as follows:

- You can standardize or differentiate how an employee is dealt with for a personnel calculation rule using the grouping of employee subgroups. For example, you can control whether an employee's remuneration is calculated on a monthly or hourly basis using this grouping.
- You determine which wage types are permissible for which employee subgroups using the employee subgroup grouping for the primary wage types.
- With the employee subgroup grouping for collective agreement provision you restrict the eligibility of pay scale groups, so that only certain pay scale groups are valid for specific employee subgroups.
- You determine which work schedules are permissible for which employee subgroups using the employee subgroup grouping for the work schedule.

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- You can set up appraisal criteria dependent on employee subgroup using the employee subgroup grouping.
- The employee subgroup enables you to define data entry default values, for example, for the payroll area or an employee's basic pay.
- The employee subgroup is a selection criterion for evaluations.
- Employee subgroups are an authorization check unit.

You set up your company specific personnel structure for the employee subgroup level. The standard system contains a few specimen employee subgroups. You can copy the employee subgroups that are delivered or if necessary adjust them to your company specific needs.

Payroll Area

The payroll area is an organizational unit in the Human Resources department which can be defined for a unified payroll area. Based on organizational assignment criteria, all of the employees who are accounted simultaneously in the payroll are assigned to the same payroll area.

In *Personnel Administration* Customizing, the payroll area is defined by a two-character, alpha-numeric code.

As a rule, the payroll is run for payroll areas. The following information is provided for *payroll* via the payroll area:

- the number of employees for whom a payroll run is to be run
- the specific payroll dates

The number of employees is determined by the infotype Organizational Assignment [Page 65] (0001), which is where the employee's payroll area is stored.

The specific dates for which the payroll runs are determined as follows:

- The general payroll period is stored as a period modifier for each payroll area. For example, *payroll* can be performed on a monthly, semi-monthly, bi-weekly, or weekly basis.
- The exact dates are stored for each valid accounting period.
- The exact dates of the current payroll period are determined by using the payroll control record, which contains the period for which the last payroll was run, and the next period for which the payroll will run.

A payroll area can only be changed at the end of a period. For example, if an employee's status changes from an industrial worker to a salaried employee in the middle of a month, and if these statuses are in different payroll areas, and if the payroll is run for calendar months, then the new payroll area cannot be entered until the beginning of the next month.

Organizational Key

The organizational key consists of a 14-character field that you can construct as you wish. Specific control and rule tables can help you do this. Because the organizational key is part of the authorization concept in *Personnel Administration* and *Organizational Management*, it makes it easy for you to enhance the authorization check.

Do not confuse the organizational key with the organizational unit. They are not related in any way.

If you require further information on the organizational key, please see the Elements of the Enterprise Structure [Page 30] section.

The Personnel Structure From the Organizational Perspective

The personnel structure from the organizational perspective makes a distinction between two situations:

- **No Integration with *Organizational Management*:** You have only implemented *Personnel Administration* or have *Organizational Management* as well but they are separate.
- **Integration with *Organizational Management*:** You implement both *Personnel Administration* and *Organizational Management* in an integrated manner.

No Integration with *Organizational Management*

There is no technical link between *Personnel Administration* and *Organizational Management* tables. In this case you have to set up the sequential elements of the organizational personnel structure in the *Personnel Administration* customizing tables.

- *Position*

  A position is an individual employee assignment in a company (e.g. head of marketing department, head of personnel department). A position is an organizational grouping of work that can be performed by one person.

- *Job*

  A job is a general classification of task areas (e.g. head of department). A job is a standard description of an activity that can be performed by a person.

- *Organizational unit*

  An organizational unit represents a user-defined organizational unit whose job it is to take on and carry out certain functions within a company (e.g. department, project group).

Integration to Organizational Management

There is a technical link between *Personnel Administration* and *Organizational Management* tables. In this case you have to set up the elements of the organizational personnel structure in the *Organizational Management* customizing tables.

Position

If *Organizational Management* is integrated, you must take note of the following when assigning an employee to a position:

In *Organizational Management*, you can link the position data to the following fields data:

- *Company code*
- *Personnel area*
- *Personnel subarea*
- *Cost center*
- *Controlling area*

- *Business area*
- *Employee group*
- *Employee subgroup*
- *Job*
- *Organizational unit*

This link has practical consequences on **personnel actions**, e.g. *Hiring* and *Organizational reassignment*.

- **Infotype 0000 *Actions***

  When you hire a new employee, the fields *Personnel area, Employee group* and *Employee subgroup* fields in the Actions (0000) [Page 59] infotype can be automatically filled with values from *Organizational Management,* once you have assigned the relevant position.

  If you decide to fill the fields *Personnel area, Employee group* and *Employee subgroup* manually, these values will be validated against the data stored for the position. If the data is inconsistent, you will receive a warning message.

  If these fields already contain entries when you run hiring actions one after the other, or when you perform an *organizational reassignment,* and if you have not yet assigned a new position, this data is also validated against the data of the new position that you now assign.

- **Infotype 0001 *Organizational Assignment***

  In the Organizational Assignment (0001) [Page 65] infotype, the field *Percentage* will appear. Here, you can determine the employment percentage for the position.

  You must interpret the staffing percentage entered in conjunction with the (planned) working time for this position. The (planned) working hours are stored in the position staffing schedule in *Organizational Management*.

  If the staffing percentage is less than 100%, a dialog box appears. It enables you to assign the employee to additional positions within *Organizational Management*.

  Only one *Organizational Assignment* (0001) infotype record exists for *Personnel Administration*.

  If you assign several positions, only the data for the position with the highest staffing percentage is taken into consideration.

Job, Organizational Unit

The job and the organizational unit are automatically derived from the position if *Personnel Administration* and *Organizational Management* are integrated.

Pay Scale Structure

Definition

Binds collective agreement elements with the primary aim of determining each remuneration according to the collective agreement.

Structure

The pay scale structure is defined by the following elements:

- Pay scale type
- Pay scale area
- *Employee subgroup grouping for collective agreement provisions*
- Pay scale group
- Pay scale level

Integration

You assign employees to the pay scale structure in the following infotypes when entering their master data:

- *Basic Pay* (0008)
- *Recurring Payments and Deductions* (0014)
- *Additional Payments* (0015)
- *Wage Maintenance* (0052)

Elements of the Pay Scale Structure

The pay scale structure consists of the following elements:

Pay scale type

The pay scale type defines the area of economic activity for which a collective agreement is valid. The area in which it is valid may be determined at company or trade union level and often applies to a whole industry, for example, the chemical and metal processing industries or the civil service.

The pay scale types are described by a four-character alphanumeric identifier per country grouping and are defined in Customizing for *Personnel Administration*.

Within a pay scale type, you define the pay scale groups and levels for each pay scale area and employee subgroup grouping for collective agreement provisions.

Pay scale area

The pay scale area defines the *geographical* area in which a collective agreement is valid. The geographical validity area is determined by the size of the pay scale area. In Germany, you differentiate according to the size of the pay scale area, the district, borough, state, and country pay scale, for example, Hessen, Saxony.

The pay scale areas are described by a four character alphanumeric identifier per country grouping and are defined in Customizing for *Personnel Administration*.

Within a pay scale area, you define the pay scale groups and levels for each pay scale type and employee subgroup grouping for collective agreement provisions.

The default values for pay scale types and groups are linked to the personnel subarea and are defined in Cutomizing for *Personnel Administration*. These default values are suggested when you create a record in the *Basic Pay* infotype (0008).

Employee subgroup grouping for collective agreement provisions

With the employee subgroup grouping for collective agreement provision you restrict the eligibility of pay scale groups, so that only certain pay scale groups are valid for specific employee subgroups.

You define the employee subgroup grouping for the collective agreement provision by employee group. The following entry options are available:

- Industrial workers/hourly wage
- Industrial workers/monthly wage
- Salaried employees
- Non-pay scale employees
- Public Sector employees

The employee subgroup grouping for the collective agreement provision has the following organizational functions:

- You can define pay scale groups and levels according to pay scale type and pay scale area within the employee subgroup grouping for collective agreement provision.
- If you perform indirect valuation, the amounts are converted on an hourly or monthly basis depending on the employee subgroup groupings for personnel calculation rules and collective agreement provisions.

Pay Scale Group and Pay Scale Level

Pay scale groups and pay scale levels are the criteria used to classify data for job evaluations and indirect valuations. Pay scale levels are subdivisions of pay scale groups.

You define pay scale groups and levels per country grouping, pay scale type, pay scale area and employee subgrouping grouping for the collective agreement provision in Customizing for *Personnel Administration*. When doing so, you describe pay scale groups using an alphanumeric identifier with a maximum of eight characters and describe pay scale levels using a two-character alphanumeric identifier.

The pay scale group and pay scale level have the following control function: For Indirect Valuation [Ext.] of wage types, the system automatically assigns payments to the wage types.

Data Structures in Personnel Administration

This section gives you an overview of

- Data structure elements in Human Resources Management
  - Information types, commonly known as infotypes [Page 43]
  - Information subtypes, commonly known as subtypes [Page 45]
  - Object identification [Page 46]
- Data structure elements' characteristics
- the interrelationships between data structure elements
- Personnel Administration infotypes [Page 48]

Infotypes

Definition

Infotypes are units of information in the Human Resource Management System.

Use

Recording employee data for administrative, time recording, and payroll purposes is of primary importance for master data administration in HR. In the SAP System, the information units used to enter master data are called **infotypes**.

Infotypes are used to group related data fields together. They provide information with a structure, facilitate data entry, and enable you to store data for specific periods.

Structure

Infotypes are characterized by the following:

- Infotype Structure
- Data Entry
- Time-Dependent Storage of Infotype Data

Infotype Structure

To the user, infotypes appear as data entry screens. They contain whole series of information (for example, last name, first name, date of birth) that you enter in data fields. Data fields concerning the same or similar subject matter are combined into data groups or information units.

In database terms, infotypes represent a data structure or set of related data records. When you update an infotype, old data is not lost but is instead stored in the system for historical evaluation purposes.

Data Entry

You perform data entry as follows:

- Your entries are automatically checked for accuracy and against table entries.
- Predefined default values help you to enter and maintain data.
- Checks and default values depend on the employee's organizational assignment. The organizational assignment determines the relevant information used from time recording, wage type and pay scale structure.

Time-Dependent Storage of Infotype Data

When you update an infotype, the old data may not be lost. Instead, it must be retained so that past data can be evaluated. When you update an employee's personal data, the old data is automatically time-delimited. The system creates a validity period for each infotype record. As a result, each employee infotype has several data records that differ from each other by their validity periods.

Infotypes

You must also define how the various data records of one infotype interact with each other with respect to their validity periods. This time-based reaction is determined by the infotype Time Constraint [Page 234].

You can assign authorizations on an infotype basis.

Assigning Infotypes to Countries

You can define the permissibility of infotypes for each country, which will restrict the selection of infotypes available when you edit master data.

Infotype **Fiscal Data D** (0012) should only be displayed for employees assigned to country grouping Germany.

For more information, refer to the IMG for *Personnel Management*, under *Personnel Administration* → *Customizing Procedures* → *Infotypes* → *Assign Infotypes to Countries*.

Infosubtypes

Definition

Subunits of an infotype.

Structure

Subtypes are used to subdivide infotype records. They subdivide infotype data by subject matter, which makes it easier for you to access and manage information, or to assign different control features (such as time constraints) to different subtypes. You can also create separate histories for each subtype.

You create the following address types in infotype *Addresses* (0006):

- *Permanent residence* (subtype 1)
- *Temporary residence* (subtype 2)
- *Home address* (subtype 3)

Because different addresses may be current at the same time, you must choose time constraint 3 for infotype *Addresses* (0006). However, because a record of permanent residence must always exist, time constraint 1 must be used for this subtype. A home address, on the other hand, is not absolutely essential and only one can exist once at any one time, so time constraint 2 is appropriate.

Because the relevant entry screens and check logics are identical irrespective of the address type, there is no point creating one infotype per address type.

Subtypes enable you to take account of the various time characteristics of different infotypes. You specify a time constraint for each subtype, irrespective of the other subtypes.

Other examples of infotypes with subtypes are: *Recurring Payments and Deductions* and *Additional Payments*.

Integration

Subtypes do not represent a level below infotypes. Instead, infotypes are divided into subtypes, each of which represents a different category of infotype with its own time characteristics.

The entry screens of individual subtypes may differ one from the other.

You can assign authorizations on a subtype basis.

Object Identification

Definition

The object identification distinguishes between data records that have the same infotype, subtype, lock indicator, and validity begin and end dates.

Structure

The object identification (object ID) splits subtypes into individual objects. You can create a separate history for each object. The object ID automatically inherits the time constraint assigned to the subtype.

Infotype *Family/Related Person* (0021) is divided into the following subtypes:

- *Spouse* (Subtype 1)
- *Child* (Subtype 2)
- *Legal Guardian* (Subtype 3)

Time constraint 2 is assigned to the individual subtypes so that you can create a separate history for each of them.

However, if you need to enter data on more than one child, you must assign time constraint 3 to the subtype because the data records of the various children will overlap. Introducing an object ID allows you to generate one history per child. The object ID is stored in the infotype as the *Child number*.

The *Company Loans* infotype (0045) is another example of an infotype with an object ID.

Infotype Groups

Definition

An **infotype group**, or **info group**, is a sequence of related infotypes that are displayed one after the other for maintenance purposes when a personnel action is performed.

Use

The infogroup guarantees that during the personnel action, all information needed for the business processes is stored.

Structure

An infogroup exists in the standard system for every personnel action type in the Personnel Actions [Page 153] section.

In Customizing for *Personnel Administration,* you can modify the relationship between individual infogroups and define the infogroups as user-dependent.

Integration

The infogroup is processed when Running a Personnel Action [Page 155].

See also:

Scrolling Through an Infotype Group [Page 158]

Changing an Infotype Group Temporarily [Page 159]

Personnel Administration Infotypes

This section provides you with an overview of the infotypes in *Personnel Administration*.

They are divided into the following groups:

Personal Data (International)

This group includes the following infotypes:

Addresses (Infotype 0006)

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

The standard system contains the following address types:

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

Foreign Addresses

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

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

Country-Specific Features

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

Bank Details (Infotype 0009)

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

The standard system contains the following bank detail types:

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

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

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

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

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

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

Country-Specific Features

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

Challenge (infotype 0004)

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

Challenge Data

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

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

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

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

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

Issuing Authority

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

Second Issuing Authority

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

Personal Data (Infotype 0002)

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

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

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

Marital Status/Religion

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

Country-Specific Features

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

Family/Related Person (Infotype 0021)

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

The standard system contains the following relation types:

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

Personal data

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

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

You can change these default values as required.

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

National Features

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

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

Internal Medical Service (Infotype 0028)

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

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

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

Examination Data

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

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

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

Personnel Actions (International)

This group consists of the following infotypes:

Actions (Infotype 0000) [Page 59]

Actions (Infotype 0000)

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

You can use personnel actions to:

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

Personnel Action

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

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

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

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

Status

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

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

- Customer-specific (Status 1)

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

- Employment (status 2)

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

  - In Reporting

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

  - In time-constraint validation

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

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

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

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

- Special payment (status 3)

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

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

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

Organizational Assignment

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

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

Additional Actions

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

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

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

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

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

Organizational Data (International)

This group includes the following infotypes:

Cost Distribution (Infotype 0027)

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

Cross-Company Code Transactions [Ext.]

Posting Information from Master and Time Data [Ext.]

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

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

Cost Distribution

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

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

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

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

Note the following special features:

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

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

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

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

Organizational Assignment (infotype 0001)

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

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

Enterprise structure

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

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

Personnel structure

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

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

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

Country-Specific Features

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

Reference Personnel Number (Infotype 0031)

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

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

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

Reference Personnel Number

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

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

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

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

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

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

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

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

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

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

Reference Personnel Number Priority (Infotype 0121)

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

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

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

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

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

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

Restrictions

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

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

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

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

The following new records cannot be created:

- Record 1: <P3,P1>

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

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

  This record contradicts the combination in records B and C.

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

Current Priority

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

Previous Priority

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

Reference Personnel Number (Infotype 0031)

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

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

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

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

Choice of Reference Personnel Numbers

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

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

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

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

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

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

Sales Data (Infotype 0900)

Within the master data stored for the *Sales and Distribution* (SD) application component, the **sales employee** is created as a special business partner. The sales employee processes business transactions within the enterprise.

In infotype *Sales Data* (0900), you can administer the sales employee as an employee in the *HR* component. In this way, the employee data can be administered using the personnel number.

Sales data

Assign the employee to a *Sales organization*, a *Sales office*, and a *Sales group*.

- If you have both the SD and HR SAP components in your enterprise, only the responsible personnel administrator can create a data record in the *Sales Data* infotype (0900).
- If you do not implement the HR component in your enterprise, the infotype record is created for the employee in the SD component.

Contractual and Corporate Agreements (international)

This group includes the following infotypes:

Company Instructions (infotype 0035)

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

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

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

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

Corporate Function (infotype 0034)

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

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

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

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

Internal Control (Infotype 0032)

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

Company Car

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

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

You can use the Car Search List [Page 392] report to create a list of car license plate numbers.

Work center

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

Works Councils (infotype 0054)

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

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

Works Councils

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

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

Objects on Loan (Infotype 0040)

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

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

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

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

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

Contract Elements (Infotype 0016)

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

Contractual Regulations

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

Payment Periods During Illness

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

Deadlines

Here, you can store the following:

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

Entry

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

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

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

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

Country-Specific Features

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

Contract Elements (Infotype 0016)

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

Powers of Attorney (infotype 0030)

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

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

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

Power of Attorney

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

Payroll Data (International)

This group includes the following infotypes:

Payroll Status (Infotype 0003)

Definition

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

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

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

Use

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

Structure

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

It is only worthwhile making such changes for a few exceptional cases. For more information, see Changing The Payroll Status [Page 195].

Basic Pay (Infotype 0008)

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

The standard system contains the following reference types:

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

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

Pay scale

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

Wage types

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

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

See also:

Enter Basic Pay [Ext.]

Performing a Personnel Action [Ext.]

Performing a Standard Pay Increase [Ext.]

Appraisals (Infotype 0025)

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

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

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

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

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

- Individual Appraisals

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

- Group Appraisals

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

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

Appraisal

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

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

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

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

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

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

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

Appraisal Attributes

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

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

Additional Payments (Infotype 0015)

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

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

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

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

Additional Payments

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

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

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

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

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

See also:

Edit Additional Payments [Ext.]

External Bank Transfers (infotype 0011)

You save essential information for external bank transfers in the *External Bank Transfers* infotype (0011). External bank transfers are, for example, insurance contributions for an employee's insurance fund and deductions for rent to be paid to the employee's landlord.

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

- Subtype M770: *Deduction for rent*

Payment Data

Specify which wage type is to form the basis for the external bank transfer in the *Wage type* field. In conjunction with the *Wage type* you must process either the field *Amount* or the fields *Number* and *Unit.* The system checks the combination you entered. The currency is defaulted according to the company code. This can be overwritten.

You can determine the payment periods by making an entry in the fields *1st payment period* and *Interval (periods)* for the next and all subsequent periods, or by making an entry in the fields *1st payment date* and *Interval/unit* for the next and all subsequent days. Enter the payment period without the payroll year. The subsequent payment periods will be determined by adding the intervals.

Payee

You have two possibilities when entering payee data:

- In the field *Payee key* enter the key for a payee that has been defined in your system. The system will then determine the payee's name, address and bank details and the payment method from this key.
- If you do not make an entry in the field *Payee key*, then you have to enter the payee's name, address, bank details and payment method manually.

Do not make any additional entries for the payee or the payment method if you have entered a *Payee key.*

In the field *Purpose* you can enter a text of your choice. In the field *Priority* you can store the priority of an external bank transfer. This field is not used in the standard system.

Membership Fees (Infotype 0057)

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

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

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

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

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

Payment Data

Enter the relevant wage type for membership here.

Payee

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

Insurance (Infotype 0037)

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

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

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

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

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

Insurance data

Enter the following data:

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

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

Recurring Payments/Deductions (Infotype 0014)

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

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

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

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

Recurr. Pay/Deduc

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

Date of Payment

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

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

See also:

Define Recurring Payments and Deductions [Ext.]

Country-Specific Features

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

Reporting Bases (International)

This group includes the following infotypes:

Date Specifications (infotype 0041)

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

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

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

Date Specification

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

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

Monitoring of Tasks (Infotype 0019)

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

Task

The standard system contains the following task types:

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

Reminder

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

You have three possibilities for confirming the reminder date:

- You can enter the reminder date directly.

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

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

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

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

Employee Qualification (International)

This group includes the following infotypes:

Other/Previous Employers (Infotype 0023)

You can store information concerning where an employee or an applicant (in a sideline job) works, or worked prior to starting work with your company in the *Other/Previous Employers* infotype (0023).

If you want to store information about more than one of an employee's or applicant's employers, you have to create many data records within this infotype, each with their respective validity period.

You have to specify the employer's name and the country for each employer. You can also store the following details about an employer:

- *Location*
- *Industry sector*
- *Activity* that the employee or applicant carried out or carries out

The standard SAP System does not use the *Other/Previous Employer* (0023) infotype in reporting. If you need to, you can use the infotype for your own evaluations or in an ABAP query.

Education (Infotype 0022)

You can store what education and training qualifications an employee or an applicant has passed in the *Education* infotype (0022).

If you want to store information about the an employees' or an applicants' complete training, you have to create many data records within this infotype, each with their respective time periods.

Enter the following data for each training and education qualification:

- *Educational establishment type* (e.g. elementary school, university, internal/external course)
- *Institute/Place*(e.g. University for applied science, Hannover)
- *Country key*, i.e. the country in which the education/training institution is based

Caution: the system checks the school leaving certificate against the type of school.

You can specify how long each training and education qualification lasted and which two branches of study form the focus of study. The system checks the specified branch of study against the specified type of school.

If the system is set up accordingly, it automatically informs you the vocational categories that belong to the specified education/training.

Qualifications (Infotype 0024)

You store an employees'/applicants' qualifications in the *Qualifications* infotype (0024).

If you want to store information about more than one of an employee's/applicant's qualifications, you have to create many data records within this infotype.

Assign each qualification an appropriate key. In addition, you can state a proficiency level for each qualification.

Communication (International)

This group consists of the following infotypes:

Communication (infotype 0105) [Page 100]

Communication (Infotype 0105)

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

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

- **Subtype 0001: active SAP System**

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

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

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

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

Communication

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

Subtype 0011 (Credit card numbers)

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

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

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

These identification codes are:

- AX (American Express)

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

Authorization Management (International)

This group consists of the following infotypes:

Test Procedures (Infotype 0130) [Page 103]

Test Procedures (Infotype 0130)

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

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

- the releaser's user ID
- date
- time
- program used to implement the release

This data is set by the system and cannot be entered. This data is simply displayed.

If a test procedure is carried out for an employee up to a certain release date (this information is stored in infotype 0130), a write authorization may no longer being sufficient for changing certain infotype data whose validity start date is before the release date.

When you set up your system you assign test procedures to info(sub)types, i.e. you determine which info(sub)types are included in which test procedures. To be able to make limitless changes to an info(sub)type that has been assigned to a test procedure, you need to have a write authorization for the assigned test procedure (infotype 0130) in addition to the write authorization that you require to make changes to the info(sub)type.

As a rule, the infotype Test Procedures is not edited manually but when a program is used to set a release date for a selected number of persons. (The standard SAP system contains an example program that supports the release of time data. This program is RPTAPPU0).

In the framework of decentralized time recording, the time administrator records certain absences. When the system is set up, these absences are assigned test procedure P. The time administrators have a write authorization for absences, but they do not have a write authorization for infotype 0130, subtype P. An inspector (with a write authorization for infotype 0130, subtype P) can implement the release for one (or more) persons up to January 31st i.e. he or she enters the release date January 31st in infotype 0130, subtype P. After that, the absences for the relevant persons cannot be changed by the time administrator if the validity start date is before February 1st.

Business Processes in Personnel Administration

The following sections describe basic tasks that you perform when managing employee data. These tasks include hiring employees, performing organizational reassignments, and ensuring that the correct data is entered in the system when employees leave the enterprise. These sections also describe functions that enable you to correct errors made when handling personnel administration. For example, you might need to change an employee's Entry Date [Page 115] after he or she has started working for the enterprise, or you may need to delete a Personnel Number [Page 125].

Employee data in the *Personnel Administration* application component must be stored in such a way that enables you to easily access and maintain specific data at any time. In the SAP R/3 System, employee data is stored in individual infotypes [Page 43] that group the data together by subject matter. For example, infotype 0002 Personal Data [Page 53] contains the employee's name and date of birth, and sometimes additional information such as marital status and religious denomination.

Some employee data, such as the employee's name or payroll data, must be stored in the system. For this reason, the infotypes contain **required entry fields**. You can easily identify these fields as they contain a question mark. You cannot conclude data entry until you have entered data in all of an infotype's required entry fields.

There are many different ways to maintain or display employee data. The *Maintain HR Master Data* function enables you to access an employee's individual infotype records. The *Fast Entry* function, on the other hand, enables you to create and maintain an infotype record for many employees simultaneously.

If you require further information on how to maintain, display, and use the fast entry function for HR master data, refer to the Processing Human Resource Data [Page 173] section.

When you perform essential personnel administration tasks, such as hiring a new employee, you must enter a wide variety of data in the system. This entails processing a series of infotypes. These basic tasks are grouped together to form separate Personnel Actions [Page 153].

Each personnel action contains the infotypes that you must maintain to perform the task at hand. The infotypes are retrieved in succession so that you can maintain them. This ensures that you enter all of the information required for each personnel action type.

See also:

Hiring a New Employee [Page 105]

Organizational Reassignment of an Employee [Page 129]

Country Reassignments [Page 133]

Change in Pay [Page 139]

Leaving The Enterprise [Page 142]

Reentry into Company [Page 148]

Hiring a New Employee

Purpose

When you hire a new employee at your enterprise, you must enter a large amount of data on this employee for the first time. You enter the employee data in different Infotypes [Page 43] in the SAP R/3 System.

You hire the employee by performing a Personnel Action [Page 153]. When you perform the *Hiring* personnel action type, all of the infotypes that you need to maintain to hire an employee are displayed automatically, one after the other.

Prerequisites

The *Hiring* personnel action type groups various logically related infotypes together to form an Infotype Group [Page 47]. If you want to enter additional employee data using the hiring action, you can change these infotype groups in *Personnel Administration* Customizing. In the standard system, the sequence of infotypes displayed by running the *Hiring* personnel action type ensures that essential data on the employee is stored in the system.

Process Flow

When you perform the *Hiring* personnel action type, you must note the following:

Recording Entry

When an employee enters your company, a data record is stored in the infotype Actions (0000) [Page 59] whilst you execute the personnel action type *Hiring*. The date and the reason for hiring somebody is stored in this infotype record (e.g. expansion, special projects).

When you run the *Hiring* personnel action type, you enter different types of data in the various infotypes:

- Organizational Data

  The employee to be hired is assigned to the Enterprise Structure [Page 28] and Personnel Structure [Page 33]. In the Human Resource Management system, the employee's organizational assignment plays a key role. The organizational assignment determines which data can be entered in which infotypes (such as the Basic Pay [Page 82] infotype: Salary for salaried employees and hourly wage for hourly wage earners). It also determines the default values.

  If the *Personnel Administration* component is integrated with the *Organizational Management* component, you can link the data on the employee's organizational assignment in *Organizational Management* to the data on the position. This link has practical consequences when processing the *Actions* and Organizational Assignment [Page 65] infotypes.

  For futher information see the following sections:

  The Personnel Structure from the Organizational Perspective [Page 37]

  Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

The organizational assignment is not only important for the authorization relationships and its effect on the payroll, but also as it determines which administrator is authorised to adminster an employee.

- Personal Data

  When you hire a new employee, you enter personal data such as name, date of birth, marital status, address(es), and bank details in the system.

- Payroll-relevant data

  Payroll data such as the employee's basic pay, savings plans, and insurance and tax data is also maintained when you perform the *Hiring* personnel action type.

- Contractual and Corporate Agreements

  When you hire an employee, you also enter data which affects the employee's legal contractual rights and their location specific working conditions and agreements.

- Time data

  Furthermore, you enter the employee's planned working time and other data required by *Time Management*.

Assigning a Personnel Number

When an employee is hired, he or she is assigned one personnel number. You can either assign this personnel number (external number assignment) yourself, or it can be assigned automatically by the system (internal number assignment). You can use the system settings in *Personnel Administration* Customizing to determine whether personnel numbers are assigned automatically or not.

The applicant number which is stored in the *Recruitment* component for an applicant is not taken on as the personnel number.

If you enter a personnel number incorrectly, you can delete it. However, you should only delete personnel numbers in the test system.

See also:

Deleting a Personnel Number [Page 125]

When a new employee is hired, you can enter a reference personnel number in infotype 0000 *Actions*.

This creates a link between the various personnel numbers assigned to the same employee. The link remains in the system.

For further information on reference personnel numbers, see the Reference Personnel Numbers (Infotype 0031) [Page 66] section.

Recording Entry Date

The **entry date** (start date for the validity period) is an important date for many procedures within *Personnel Administration*. For example, it is used to determine seniority and for payroll. You should enter the date on which the employee entered the company for the entry date. This date is also used in the *Organizational Assignment* infotype (0001).

In the standard system, December 31, 9999 is the default **end date** for the validity period. This means that the employee's validity period is unlimited. Do not change this date for employees who have a permanent work relationship.

If, due to an error, the entry date you entered for an employee in the system does not correspond to the actual date on which the employee entered the company, you can change the employee's entry date once the hiring action has been completed. However, we recommend that you only do this if it is really necessary.

For further information about how to correct the hiring personnel action after it has been carried out, see Changing the Entry Date for an Employee [Page 115].

Checking, Canceling, and Restarting the Hiring Personnel Action Type

You can check the data that you have entered by re-starting and re-running the *Hiring* personnel action type. Even if you do not have all the data that must be entered in the system, you can still carry out the action and then skip the individual infotypes whilst still in the personnel action. You can interrupt an action whenever you want to and restart it at a more appropriate point in time.

See also:

Skipping an Infotype During a Personnel Action [Page 157]

Interrupting and Restarting a Personnel Action [Page 160]

Transferring an Applicant

You can transfer the data on an applicant from *Recuitment* to *Personnel Administration* in different ways:

- directly from *Recruitment*
- or you can use the personnel actions types *Transfer applicant data* and *Transfer other applicant data* whilst in *Personnel Administration* to retrieve the applicant data from *Recruitment*.

For additional information, see the *Transferring Applicant Data to Personnel Administration* section in the *PA - Recruitment* section.

Integration With Organizational Management

Your decision as to whether to implement the *Organizational Management* application component has an immediate effect on how you perform the *Hiring* personnel action type. The different procedures are described in the following sections:

See also:

Hiring an Employee Without Integration With Personnel Planning [Page 109]

Hiring an Employee With Integration With Personnel Planning [Page 111]

Result

You have entered all the necessary data for a new employee in the system using the *Hiring* personnel action type.

Hiring an Employee When *Organizational Management* is Not Integrated

Prerequisites

No Integration With *Organizational Management*: *Personnel Administration* and *Organizational Management* are not integrated, or you may have only implemented *Personnel Administration*.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The system displays the *Personnel Actions* screen.

2. Enter the new employee's personnel number.

   You can use the system settings in Customizing for *Personnel Administration* to determine whether personnel numbers are assigned automatically or not.

3. Enter the hiring date as the start date.

4. Select the *Hiring* personnel action type.

   You can enter the *Personnel area, Employee group* and *Employee subgroup* for the new employee here.

5. Choose *HR master data* → *Execute*.

   The system displays the *Actions* (0000) infotype screen. If the employee has a permanent work relationship, do not change the default end date.

   In the standard system, the *Hiring* personnel action type contains several logically related infotypes that are grouped together to form an infotype group [Page 47]. The system automatically displays these infotypes in succession so that you can maintain them. This is to ensure that the essential core employee data is entered into the system.

   When customizing *Personnel Administration* you can adapt the infotypes within the personnel action, and the sequence in which they appear, so that they meet your company's specific requirements. SAP recommends that you only enhance this selection of infotypes. Please refer to the IMG for more information. You can also change the infotype group temporarily by using the Change Infotype Group [Page 159] function.

6. Edit the data records for the new employee in the order they are presented to you.

7. Choose *Enter* to check your entries.

   Your entries are checked against the data stored in the system. If your entries do not correspond to the data stored in the system, the system displays an error or warning message. In this case, you must correct the entries concerned.

8. Save your entries.

   The next infotype is automatically displayed.

   Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel action. You can interrupt a personnel action whenever you want to and restart it at a more appropriate point in time.

   For more information see the following sections:

   Skipping an Infotype During a Personnel Action [Page 157]

   Interrupting and Restarting a Personnel Action [Page 160]

   When you save the last infotype in the infotype group, the system takes you back to the initial personnel actions screen.

Result

You have performed the *Hiring* personnel action type for the new employee (without *Organizational Management* integrated).

Hiring an Employee When *Organizational Management* is Integrated

Prerequisites

Integration with Organizational Management: you implement both *Personnel Administration* and *Organizational Management*.

Procedure

9. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The system displays the *Personnel Actions* screen.

10. Enter the new employee's personnel number.

    You can use the system settings in Customizing for *Personnel Administration* to determine whether personnel numbers are assigned automatically or not.

11. Enter the hiring date as the start date.

12. Select the *Hiring* personnel action type.

    When you hire a new employee, the fields *Personnel area, Employee group* and *Employee subgroup* fields in the infotype *Actions* (0000) may be automatically filled with values from *Organizational Management,* once you have assigned the relevant position. For this reason, you must not maintain these fields on this screen. Instead, you must maintain the *Position* field in infotype 0000 *Actions*.

    If you decide to fill the fields *Personnel area, Employee group* and *Employee subgroup* manually, these values will be validated against the data stored for the position. If the data is inconsistent, you will receive a warning message.

13. Choose *HR master data* → *Execute*.

    The system displays the *Actions* (0000) infotype screen. If the employee has a permanent work relationship, do not change the default end date.

    In the standard system, the *Hiring* personnel action type contains several logically related infotypes that are grouped together to form an infotype group [Page 47]. The system automatically displays these infotypes in succession so that you can maintain them. This is to ensure that the essential core employee data is entered into the system.

    When customizing *Personnel Administration* you can adapt the infotypes within the personnel action, and the sequence in which they appear, so that they meet your company's specific requirements. SAP recommends that you only enhance this selection of infotypes. Please refer to the IMG for more information.

14. Edit the data records for the new employee in the order they are presented to you.

    The infotypes *Actions* (0000) and *Organizational Assignment* (0001) are affected by integration between the *Personnel Administration* and *Organizational Management* components.

    For more information see the following sections:

    Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

    Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

15. Choose *Enter* to check your entries.

    Your entries are checked against the data stored in the system. If your entries do not correspond to the data stored in the system, the system displays an error or warning message. In this case, you must correct the entries concerned.

16. Save your entries.

    The next infotype is automatically displayed.

    Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel action. You can interrupt a personnel action whenever you want to and restart it at a more appropriate point in time.

    For more information see the following sections:

    Skipping an Infotype During a Personnel Action [Page 157]

    Interrupting and Restarting a Personnel Action [Page 160]

    When you save the last infotype in the infotype group, the system takes you back to the initial personnel actions screen.

Result

You have performed the *Hiring* personnel action type for the new employee (with *Organizational Management* integrated).

Processing *Actions* Infotype (0000) if *Organizational Management* is Integrated

If the *Organizational Management* component is integrated with *Personnel Administration*, note the following when using infotype Actions (0000) [Page 59]:

- Enter data for a position in this infotype in the *Position* field only.
- Within *Organizational Management*, the data on a position must be linked to the other organizational assignment data. If this is the case, when you hire a new employee, the *Personnel area, Employee group,* and *Employee subgroup* fields are automatically filled with the relevant position data stored in the *Organizational Management* component (once you have assigned the relevant position and chosen *Enter*).

  In the case of follow-on personnel actions or an organizational change, the *Personnel subarea*, *Employee group*, and *Employee subgroup* fields already contain default values before you assign a new position. If you delete these default values and choose *Enter*, the system will automatically fill these fields with the new position data.
- If you decide to fill the fields *Personnel area, Employee group* and *Employee subgroup* manually, these values will be validated against the data stored for position. If the data is inconsistent, you will receive a warning message.

Processing *Organizational Assignment* Infotype (0001) if *Organizational Management* is Integrated

If the *Organizational Management* component is integrated with *Personnel Administration*, note the following when using infotype 0001 Organizational Assignment [Page 65]:

- The additional *Percentage* field enables you to determine the employee's staffing percentage for the position.

  You should interpret the staffing percentage entered in conjunction with the (planned) working hours for this position. In the *Organizational Management* part of the system, the (planned) working hours are stored in the position staffing schedule.

- If the staffing percentage is less than 100%, a dialog box will appear when you save the infotype record. You can assign additional positions to your employees in this dialog box.

  Only one *Organizational Assignment* (0001) infotype record exists for *Personnel Administration*.

  If you assign several positions, only the data for the position with the highest staffing percentage is taken into consideration.

Changing an Employee's Entry Date

You can change the employee's entry date stored in the system after completing the hiring action.

A distinction must be made between the following situations:

The employee has not yet been included in a payroll run:

Read the section Changing an Entry Date Before the First Payroll [Page 116].

The employee has already been included in a payroll run:

- The actual entry date is after the entry date that was incorrectly entered in the system.

  Read the section Changing the Employee's Entry Date After the Payroll Run if the Actual Entry Date Comes After the Incorrect Entry Date [Page 118]

- The actual entry date is before the entry date that was incorrectly entered into the system

  Read the section Changing the Employee's Entry Date After the Payroll Run if the Actual Entry Date is Earlier Before the Incorrect Entry Date [Page 122]

There are different procedures for changing the entry date depending on which of the above cases affects you.

Changing the Entry Date Before the First Payroll Run

Use

If an employee has never been included in a payroll run, you can change his or her entry date by using the *Change Entry/Leaving Date* function. The system automatically changes all of the employee's infotype records, whose start date corresponds to the old entry date, to the new entry date.

Prerequisites

When an employee is hired using the personnel action type *Hiring*, an entry date is created in the system that does not correspond to the date on which the employee actually started working at the enterprise. If you notice the error before payroll is performed for this employee for the first time, you can change the entry date by using the auxiliary function *Change entry date.*

Changing the Entry Date of an Employee Who Has Not Been Included in a Payroll Run

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the personnel number of the employee whose entry date you want to change.

3. Select *Utilities* → *Change entry/leaving date*.

   The system displays the *Actions* (0000) infotype screen. The *From* field denoting the begin date for the record's validity is ready for you to process.

4. Enter the employee's actual entry date in the field *From*; this is the start date.

5. Save your new entries.

   If the payroll has already been run for this personnel number, then the system displays an error/warning message. Changing the entry date in this case necessitates a correction in the payroll. In this case, you must proceed as described in Changing the Entry Date After the Payroll Run if the Actual Entry Date is After the Incorrect Entry Date [Page 118] or Changing the Entry Date After the Payroll Run if the Actual Entry Date is Before the Incorrect Entry Date [Page 122].

   After you have saved this entry, the system works in the background and automatically changes all of the employee's infotype records, whose start date corresponds to the old entry date, to the new entry date.

   If errors occur in individual infotypes (for example, incorrect organizational assignment data), you will branch automatically into the infotype concerned after saving. Correct the error.

   You then return to the initial maintenance screen for HR master data.

Result

You have changed the entry date of an employee who has not yet been included in a payroll run.

Changing the EE's Entry Date After Payroll: Actual Entry Date After the Incorrect Entry Date

Use

By using the two personnel action types *Incorrect entry* and *Corrected entry*, you can change an employee's entry date after they have been included in a payroll run and if the incorrect entry date lies **before** the employee's actual entry date. You can only perform a payroll correction run if you run these two actions one after the other.

When a new employee was hired, the entry date was set incorrectly to 01.01.98 although the employee actually started work at the enterprise on 15.01.98. This error only becomes apparent after the first payroll run for this employee. To correct the employee's entry date in this example, you must perform the *Incorrect entry* and *Corrected entry* personnel action types one after the other. This is the only way of ensuring that the next payroll run deducts the extra amount paid by mistake to the employee.

Prerequisites

When an employee is hired using the personnel action type *Hiring*, an entry date is created in the system that does not correspond to the date on which the employee actually started working at the enterprise.

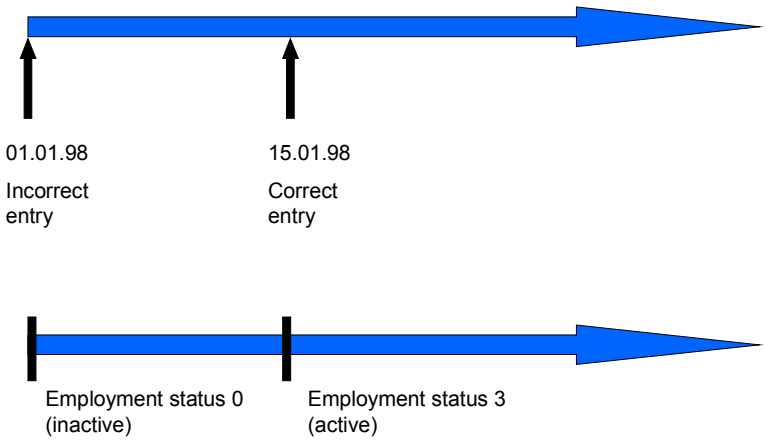
Activities

Information on the actions:

- Incorrect entry: Leave the entry date that was originally entered in the field *Valid* (valid from) *date.*
- When you perform the *Corrected entry* personnel action type, enter the date on which the employee actually started work at the enterprise in the *Start date* field.

After you have performed both of these personnel action types, the employee has employment status 0 (left) for the period between the incorrect entry date and the corrected entry date. As of the corrected entry date, the employee will have employment status 3 (active). The following graphic illustrates the interrelationship between personnel action and employment status:

Changing the EE's Entry Date After Payroll: Actual Entry Date After the Incorrect Entry Date



Both personnel action types trigger a retroactive accounting run back to 01.01.98. As a result, the extra amount mistakenly paid to the employee is deducted when the next payroll is run.

Do not make any other changes to the employee’s data when you run these personnel actions.

Changing the Entry Date After a Payroll Run if the Actual Entry Date is After the Incorrect Entry Date

Use

The *Incorrect entry date* and *Corrected entry date* personnel action types are not included in the Personnel Actions [Page 153] screen because they are only performed in exceptional circumstances and with great care.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Specify the personnel number of the employee whose entry date you want to change.
3. Choose the *Actions* infotype (0000).
4. Choose *Copy.*

   This takes you to the *Copy Actions (Infotype 0000)* screen.

5. Select the *Incorrect entry date* personnel action type.

   Do not change the pre-set validity period. In this case, the incorrect entry date is the start date of the validity period. Do not change any other data.

6. Choose *Save*.

   You return to the initial maintenance screen for HR master data.

7. Choose infotype 0000 *Actions* again.
8. Choose *Copy* again.

   This takes you once again to the *Copy Actions (Infotype 0000)* screen.

9. Select the *Correct entry date* personnel action type.
10. In the field *From* enter the date on which the employee actually started working at the enterprise as the start date of the validity period for this personnel action type.

    The *Incorrect entry* and *Corrected entry* personnel action types do not have any infotype groups. You can use the information that is already stored in the system without having to change it.

11. Save your new entries.

    You return to the initial maintenance screen for HR master data.

Result

You have corrected the employee's entry date using a method that ensures a payroll correction run.

Changing the EE's Entry Date After Payroll: Actual Entry Date is Earlier than the Incorrect Entry Date

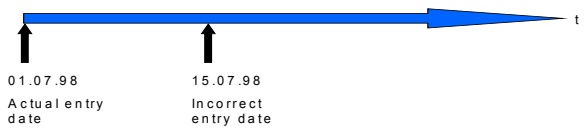
Use

By using the function *Change payroll status* you can change an employee's entry date if a payroll run has already been executed for the employee, and if the date on the incorrect entry is **after** the employee's actual entry date.

In this case, the incorrect entry date resulted in the employee being paid too little. Correcting the entry date triggers a payroll correction run to ensure that the employee receives the missing amount as a back payment.

An employee is hired on 15.07.98. After the payroll run, you discover that the employee has actually been employed at your enterprise since 01.07.98. As a result, the amount of the employee's salary is too low. To ensure that the missing amount for the period from 01.07.98 to 15.07.98 is paid, the payroll run must be repeated for this employee using 01.07.98 as the start date.

The following graphic shows you the incorrect and employee's actual entry date:



Prerequisites

When an employee is hired using the personnel action type *Hiring*, an entry date is created in the system that does not correspond to the date on which the employee actually started working at the enterprise.

Activities

Note the following points:

- First, delete the date of the last payroll run in the Payroll Status 0003 [Page 81] infotype. You can only bring the entry date forward using the *Change entry/leaving date* function after you have deleted the date of the last payroll run.

  The function used to change entries in the *Payroll Status* infotype (0003) is subject to special authorization controls. You can only delete the date of the last payroll run if

you are authorized to use the change function, and are authorized to maintain the infotype. You can only correct the entry date if the date has been deleted.

- If you have corrected the employee's entry date using the above procedure, the system automatically changes all of the employee's infotype records whose valid from date matches the old entry date so that they correspond to the new entry date. These data records are then changed in the payroll past. In addition, retroactive accounting is triggered for this period to ensure that the employee receives the missing amount when payroll is next performed.

Changing the Entry Date After a Payroll Run if the Actual Entry Date is Before the Incorrect Entry Date

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the personnel number of the employee whose entry date you want to change.
3. Select *Utilities* → *Change payroll status*.

   This takes you to the *Payroll Status* infotype (0003).

4. Delete the entry in the *Accounted to* field.
5. Choose *Save*.

   You return to the initial maintenance screen for HR master data.

6. Select *Utilities* → *Change entry/leaving date*.

   The system displays the *Actions* (0000) infotype screen. The *From* field denoting the begin date for the record's validity is ready for you to process.

7. Enter the employee's actual entry date in the field *From*; this is the begin date.
8. Save your new entries.

   After you have saved this entry, the system works in the background and automatically changes all of the employee's infotype records, whose start date corresponds to the old entry date, to the new entry date. These infotype records are then changed in the payroll past. In addition, retroactive accounting is triggered for this period to ensure that the employee receives the missing amount when payroll is next performed.

   If errors occur in individual infotypes (for example, incorrect organizational assignment data), you will branch automatically into the infotype concerned after saving. Correct the error.

   You then return to the initial maintenance screen for HR master data.

Result

You have corrected the employee's entry date using a method that ensures a payroll correction run.

Deleting a Personnel Number

Use

The *Delete personnel number* function enables you to delete HR data entered for an employee in the test system. In this way, you can also delete a personnel number that you have entered twice, for example. Once you have deleted the personnel number, you can assign it to another employee if you are not using automatic number assignment.

Do not use this function for an employee who is Leaving The Enterprise [Page 142]. When you delete a personnel number, the data stored for that particular personnel number is deleted irrevocably.

In the productive system, we strongly recommend that you do not delete a personnel number. When you delete a personnel number, all the data that you entered for this employee will be deleted and this deletion will be irrevocable. Therefore, you should only delete personnel numbers in the **test system!** For more information on reference personnel numbers, please see the Deleting a Personnel Number in the Test System [Page 126] section.

Prerequisites

The function *Delete personnel number* is subject to multiple authorization controls. If you want to delete a personnel number, you must fulfill the following prerequisites:

- You must be authorized to perform the *Delete personnel number* function.
- You must be authorized to display and edit all of the infotypes that contain data on the personnel number you want to delete

Activities

When you delete a personnel number, the system lists all of the infotypes that contain data on the personnel number. To delete the personnel number, select these infotypes. If you are not authorized to maintain these infotypes, the system will display an error message. In this case, you cannot delete the personnel number.

If payroll has already been performed for the personnel number that you want to delete in the test system, then the deletion procedure is different from the procedure used to delete a personnel number which has not yet been included in a payroll accounting run. For more information on reference personnel numbers, please see the Deleting a Personnel Number That Has Already Been Included in the Payroll Run [Page 127] section.

Deleting a Personnel Number in the Test System

Use

You can delete a personnel number and at the same time delete all the data that is stored in the system for this employee.

To avoid data inconsistencies, you must only delete personnel numbers in the test system.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the personnel number that you want to delete.

3. Choose *Utilities* → *Delete personnel number*.

   The *Delete Employee Data* screen appears. The system displays the employee's most important data and all of the infotypes containing data for this personnel number.

4. Choose *Edit* → *Select all* to select all of the listed infotypes.

   The *Delete personnel number* function is not suitable for deleting individual infotype records for a personnel number because this function does not take the infotype's time constraint into consideration, nor does it consider whether deleting the infotype will affect payroll. The time constraint of the infotypes and the possible effects caused by deleting a personnel number on payroll are not taken into account in this function.

5. Choose *HR master data* → *Delete*.

   If the payroll has already run for this personnel number, the system displays an error message. You must then proceed as described in the Deleting Personnel Numbers That Have Already Been Included in a Test Payroll Run [Page 127] section.

6. To delete the personnel number completely, choose *HR master data* → *Delete* again.

Result

You have deleted the personnel number and all of the data stored on this personnel number in the system.

Deleting Personnel Numbers for Which Payroll has Run in a Test System

Use

You can delete a personnel number and at the same time delete all the data that is stored in the system for this employee.

To avoid data inconsistencies, you must only delete personnel numbers in the test system. If payroll has already been performed for the personnel number in the productive system, you cannot delete the personnel number under any circumstances!

When you delete a personnel number, the system checks to see whether the *Accounted to* field has been filled in the *Payroll Status* infotype (0003). If there is an entry in this field, you will receive an error message when you try to delete this personnel number. You can only delete a personnel number that has already been included in a payroll run after you have deleted the entry in the *Accounted to* field in the *Payroll Status* infotype (0003).

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the personnel number that you want to delete.
3. Select *Utilities* → *Change payroll status*.

   This takes you to the *Payroll Status* infotype (0003).

4. Delete the entry in the *Accounted to* field.
5. Choose *Save*.

   You return to the initial maintenance screen for HR master data.

6. Choose *Utilities* → *Delete personnel number*.

   You branch into the *Delete Employee Data* screen. The system will display the employee's most important data and all the infotypes that have been maintained for this personnel number.

7. Choose *Edit* → *Select all* to select all of the listed infotypes.

   The *Delete personnel number* function is not suitable for deleting individual infotype records for a personnel number because this function does not take the infotype's time constraint into consideration, nor does it consider whether deleting the infotype will affect payroll. The time constraint of the infotypes and the possible effects caused by deleting a personnel number on payroll are not taken into account in this function.

8. Choose *HR master data* → *Delete*.
9. To delete the personnel number completely, choose *HR master data* → *Delete* again.

Result

You have deleted the personnel number that had already gone through payroll and all the data attached to this personnel number in the system.

Organizational Reassignment

Purpose

When you hire an employee, assign him or her to the Enterprise Structure [Page 28] and the Personnel Structure [Page 33].

If during the course of his or her employment, the employee changes positions, cost centers, or is moved to another subsidiary, his or her organizational assignment also changes.

To record one of these developments in the system, you run a Personnel Action [Page 153]. In the personnel action type *Organizational reassignment*, the system automatically displays all the Infotypes [Page 43], one after another, that must be maintained in order to record such a reassignment in the system.

Prerequisites

The *Organizational reassignment* personnel action type groups together various logically related infotypes to form an Infotype Group [Page 47]. You can use the customizing tool in *Personnel Administration* to adjust the infotype group to the individual requirements of your company.

Process Flow

If you run personnel action type *Organizational reassignment*, you must note the following points:

Entering Organizational Reassignment

- When an employee's organizational assignment changes, a data record is stored in the Actions (0000) [Page 59] infotype. The date and the reason (e.g. transfer, promotion, etc.) for the organizational reassignment are stored in this infotype.
- You can only change important organizational assignment data, such as an employee's personnel area, employee group, and employee subgroup, by performing the *Organizational Reassignment* personnel action type. Such changes have an effect on other data that determines how the employee is assigned to the enterprise structure.

  You cannot change an employee's payroll area for a period for which the employee's payroll has already run. You can only change the payroll area at the end of the payroll period.
- An employee's organizational assignment is also a factor that determines which data can be entered in other infotypes (such as wage type data). In addition to this, an employee's organizational assignment can also affect payroll controls.

  The *Organizational Reassignment* personnel action type is a business procedure. It is not a means of revising incorrect data that was entered when another personnel action type was run. If you want to correct such errors, you must perform the original personnel action type again.
- An organizational reassignment often entails a change in working hours and pay. For this reason, the system displays infotypes Planned Working Time (0007) [Ext.] and Basic Pay

(0008) [Page 82] for maintenance purposes when you run the *Organizational reassignment* personnel action type.

Integration with *Organizational Management*

If the *Personnel Administration* component is integrated with the *Organizational Management* component, you can link the data about the employee's organizational assignment in *Organizational Management* to the data about the position. This has practical consequences for the personnel action type *Organizational reassignment*: If the position changes when the employee experiences an organizational reassignment, it often results in other changes to the employee's organizational assignment data.

Notifying the Relevant Administrator About an Employee's Organizational Reassignment

Often, as a result of an organizational reassignment, the employee's data becomes another administrator's responsibility (i.e. a different administrator is authorized to read and maintain this employee's data). Sometimes, an employee is in possession of objects on loan, a company ID card, or authorizations that must be returned when he is reassigned within the organization.

In such instances, it is a good idea to inform the appropriate administrator of the organizational reassignment. In *Personnel Adminstration* customizing you set up an automatic e-mail connection using a Dynamic Action [Page 176] so that an e-mail is sent using SAP Office to the relevant administrator as soon as a corresponding infotype is processed.

Result

Using personnel action type *Organizational reassignment*, you have entered or changed all of the necessary data to record the organizational change in the system .

Performing the *Organizational Reassignment* Personnel Action Type for an Employee

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The *Personnel Actions* appears.

2. Enter the employee's personnel number.

3. Enter the date from which the change is effective for the employee as the start date for the action.

4. Choose the personnel action type *Organizational Reassignment.*

   If the *Personnel Administration* component is integrated with the *Organizational Management* component, the information on the *personnel area, employee group* and *employee subgroup* is linked with *position.* In this instance, do not process these fields here, instead process the field *Position* in the *Actions* infotype (0000).

5. Choose *HR master data* → *Execute*.

   The *Actions* infotype (0000) appears.

   In the standard system, the *Organizational Reassignment* personnel action type groups all of the infotypes together that must be processed when an employee re-enters your company to form an infotype group [Page 47]. The system automatically displays these infotypes in succession so that you can maintain them.

   When customizing *Personnel Administration* you can adapt the infotypes within the personnel action, and the sequence in which they appear, so that they meet your company's specific requirements. You can also change the infotype group temporarily by using the Change Infotype Group [Page 159] function.

6. Enter the reason for the employee's organizational reassignment in the *Actions* infotype (0000).

7. Choose *Enter* to check your entries.

   Your entries are checked against the data stored in the system. If your entries do not correspond to the data stored in the system, the system displays an error or warning message. In this case, you must correct the entries concerned.

8. Save your entries.

   The next infotype is automatically displayed.

   Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel action. You can interrupt a personnel action whenever you want to and restart it at a more appropriate point in time.

For more information, see:

Skipping an Infotype During a Personnel Action [Page 157]

Canceling and Restarting Personnel Actions [Page 160]

The infotypes *Actions* (0000) and *Organizational Assignment* (0001) are affected by integration between the *Personnel Administration* and *Organizational Management* components.

For more information, see:

Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

After you have saved the last infotype in the infotype group, you return to the initial personnel actions screen.

Result

You have performed the *Organizational Reassignment* personnel action type for an employee.

Country Reassignment

Purpose

Country Reassignment refers to an employee being assigned to an organizational unit in another country, in other words, the employee is moved to another personnel area, which is assigned to a different country grouping to that of the employee's previous personnel area.

Prerequisites

In order to depict a country reassignment in the system, you need to assign a new personnel number. This means that the country reassignment consists of a hiring action in the future and a leaving action in the previous personnel area. You can perform a country reassignment by setting up a personnel action type 'Country reassignment' in the *Personnel Action Types* table (T529A). Set the 'Country reassignment' indicator for this action. If this indicator is flagged, the hiring action in the future and the leaving action in the previous personnel area are combined.

Note that the *Country Reassignment* indicator cannot be set for the hiring action or the leaving action.

The country reassignment action only represents a link between the hiring and leaving actions, and is not logged in either the *Actions* (0000) or the *Additional Actions* (0302) infotypes. The hiring and leaving actions are logged in these infotypes. For more information on logs, see below.

You have created the country reassignment action in the Action Menu by choosing *Customizing Procedures* → *Actions* → *Change Action Menu* in the IMG for *Personnel Administration*.

Process Flow

In the *Personnel Actions* transaction (PA40), enter the previous personnel number and the date of the country reassignment (= date of entry and leaving), and select a personnel action for which the *Country Reassignment* indicator is set in table T529A. By selecting such a personnel action, a dialog box is displayed. In this dialog box, enter the required entry and leaving action. You can define the new personnel number for the hiring action the same way as you assign internal or external numbers when running the usual hiring action (according to your IMG settings for personnel number assignments).

If you run the personnel action, the system displays certain infotypes from the previous personnel number for you to copy. The exact infotypes that are displayed depends upon your Customizing settings for *Personnel Administration* under *Customizing Procedures* → *Infotypes* → *Infotypes*.

Note that the *Communication* infotype (0105) must be copied separately for the country reassignment action, if the new personnel number is to be assigned to the same user. Due to the unique user assignment required by the system, SAP recommends the following procedure: Do not process this infotype for the hiring action. Delimit this infotype in the leaving action for the previous personnel number. Then use the *Maintain Personnel Master Data* transaction (PA30) to transfer the previous user assignment to the new personnel number. If the old and new personnel numbers are both assigned to the same user, you can only access the new personnel number via SAP Employee Self-Service (SAP ESS).

Country Reassignment

If you want to use SAP ESS to access the old personnel number, or if parallel contracts exist, you must assign the new personnel number to another user.

The country reassignment action gives you the following options:

- You can perform several country reassignments for an employee.
- You can also reassign an employee to the previous personnel area or country grouping.
- An employee can be assigned to different country groupings at the same time for one contract. For each of these contracts, create a country reassignment without a leaving action, by setting the *No leaving* indicator in the relevant dialog box. To process a return to a previous area or country grouping, you perform the country reassignment action whereby the hiring action is an organizational reassignment.
- The administrator in the old country processes the country reassignment. The administrator requires authorization to create country-independent infotypes in the new country. Only the administrator in the new country is authorized to maintain country-specific infotypes for the new country. The new administrator is indicated in the *Organizational Assignment* infotype (0001). If, following a country reassignment, the new administrator is requested to edit extended infotypes for the employee in the new location, he/she can use a workflow connection. You can make the necessary settings in the IMG for *Personnel Administration*, under *Customizing Procedures* → *Actions* → *Set Up Workflow Connection for Country Reassignments*.

Result

- After you have made country reassignments, you can display the personnel numbers using the *Display HR Master Data* (PA20) or *Maintain HR Master Data* (PA30) transactions then *Extras* → *Country assignments.* You can access the relevant reference personnel numbers from this display list and also the log for the country in question.
- When you run the country reassignment action, the person-related data (qualifications, profiles, and so on) are transferred from the *Personnel Development* component to the new personnel number. The following are transferred:

ID Code	Description	Target Object Type
032	filled	qualification
037	flagged as successor	job, position
038	has potential for	work center, job, qualification, position, task
042	interests and desires	work center, job, qualification, position, task
043	dislikes	work center, job, qualification, position, task
046	contains	Appraisal
049	developed through	work center, appraisal model, job, event type, location, organizational unit, position
077	completed	development plan, career

- The country reassignment also affects the employee's relationships created for training and further education in *Training and Event Management.* This affects the following relationships:

ID Code	Description	Target Object Type
025	participates	business event
027	is pre-booked for	business event type
023	is reserved by	business event
034	attended	business event type

If a country reassignment takes place, the relationships that start after the date of the country reassignment are copied to the new personnel number. Relationships that are valid on the country reassignment date are either delimited (for flags) or remain. The system checks whether billing or allocation documents have already been created for attendances and reservations for the employee. If this is the case, you must decide how to process these relationships. The relationships then remain and are printed in the log with identifiers. No cancellation record is created for deleted attendances, however, the move-up procedure for participants on the corresponding waiting lists is performed according to Customizing for *Training and Event Management.* For deleted resource reservations, the corresponding resource type for the business event type in question is flagged as open (in other words, not reserved).

To ensure that a complete training and education history is available, the past attendances (025) are transferred to the new personnel number as attendances for the corresponding business event type. However, past reservations for the employee are not transferred to the new personnel number as a resource.

If you want to carry out additional processing for the personnel numbers within the country reassignment, you can use a Business Add-In (BAdI) as a customer enhancement. You can create this customer enhancement in Customizing for *Personnel Management* under *Global Settings in Personnel Management → Special Personnel Actions → BAdI: Personnel Actions for Country Reassignments and Leavings.*

From Release 4.6B, SAP only supports the BAdI. If you have already implemented the user exit for Release 4.6A in Customizing for *Personnel Management* under *Global Settings in Personnel Management → Special Personnel Actions → User Exit for Special Personnel Actions*, you must transfer this implementation to the BAdI in all subsequent releases.

If an error occurs during this data transfer, the transfer can carried out by running the report *Processing Errors According to Country Reassignment* (RHHANDLERELATIONS).

Example 1:

The hiring action is either terminated or not processed correctly to the end.

Restart the country reassignment action.

Example 2:

An error occurred when the employee data was transferred to the *Personnel Development* or *Training and Event Management* component.

Start report RHHANDLERELATIONS. To do this, set the *Person-related action* indicator under *Country reassignment*.

Example 3:

The leaving action is either terminated or not processed correctly to the end.

Restart the leaving action.

Delimiting Reference Personnel Numbers

Reference personnel numbers are used to depict parallel contracts in one enterprise, or one country. These contracts must all be assigned to the same country. When you create a reference personnel number, all personal data, including past infotype records, are transferred to the new personnel number, in accordance withe the settings made in the IMG for *Personnel Administration,* under *Customizing Procedures* → *Infotypes* → *Infotypes* (*Copy infotype* indicator). Entries are automatically copied for subsequent changes.

A country reassignment is used to depict successive or parallel contracts in different countries. The system proposes personal data, which you can copy (in accordance with the settings made in the IMG for *Personnel Administration,* under *Customizing Procedures* → *Infotypes* → *Infotypes* (*Propose infotype* indicator). Due to country specifications, infotypes are neither copied in the past, or for subsequent use. Data from *Personnel Development* and *Training and Event Management* is transferred once to the new personnel number.

As of Release 4.6C, this delimitation is defined in the system. If you attempt to create a reference personnel number in a different country, the system will automatically perform a country reassignment in the background. On the other hand, if you attempt to perform a country reassignment within the same country, the system will automatically redirect you to the maintenance screen for reference personnel numbers.

Effects on SAP Business Information Warehouse (SAP BW) and Reporting

In SAP BW, Headcount Queries generally count the number of salaried employees (using personnel numbers or contracts), irrespective of whether they relate to the same person (in the case of a country reassignment or a reference personnel number). You can use a switch to specify that you want to count the number of people (in other words, a headcount). If these queries are expanded to country level, you generally require a rule to determine the country in which the person is to be displayed. The contract with the oldest, active date of entry is used as the rule.

Performing the *Country Reassignment* Personnel Action Type for an Employee

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The system displays the *Personnel Actions* screen.

2. Enter the employee's previous personnel number.
3. Enter the date from which the change is effective for the employee as the start date for the country reassignment action.
4. Select the *Country Reassignment* action.
5. Choose *HR master data* → *Execute*.

   This will take you to the *Country Reassignment: Enter Action Types* screen.

6. Make the following entries for the hiring of the employee in the future personnel area in the *Entry* field:

   a) In the *Personnel number* field, enter the personnel number of the employee.

   You can define the new personnel number for the hiring action the same way as you assign internal or external numbers when running the usual hiring action (according to your IMG settings for personnel number assignments).

   b) Enter an entry action in the *Action type* field.

   c) Enter a reason for the hiring of the employee in the new area under *Reason for action*.

7. Make the following entries for the employee leaving the previous personnel area in the *Leaving* field:

   a. Enter a leaving action in the *Action type* field.

   b. Enter a reason for the employee leaving the previous area under *Reason for action*.

   An employee can be assigned to different country groupings at the same time for one contract. For each of these contracts, create a country reassignment without a leaving action, by setting the *No leaving* indicator in the relevant dialog box. To process a return to a previous area or country grouping, you perform the country reassignment action whereby the hiring action is an organizational reassignment.

8. Choose *Enter* to check your entries.
9. Now execute the hiring action for the new personnel number in the new personnel area.

If the *Personnel Administration* component is integrated with the *Organizational Management* component, the information on the *personnel area, employee group* and *employee subgroup* is linked with *position.* In this instance, do not process these fields here, instead process the field *Position* in the *Actions* infotype (0000).

10. Finally, if necessary, execute the leaving action for the old personnel number in the previous personnel area.

Result

You have performed the *Country Reassignment* personnel action type for an employee.

Change in Pay

Purpose

If an employee's payments change over time, for example through a standard pay increase, you can process the change in basic pay in the system using a Personnel Action [Page 153].

All of the Infotypes [Page 43] that you have to process when making changes to an employee's basic pay appear automatically and sequentially in the personnel action type *Changes to Pay*.

Prerequisites

The *Changes to Pay* personnel action type groups various logically related infotypes together to form an infotype group [Page 47]. You can use the customizing tool in *Personnel Administration* to adjust the infotype group to the individual requirements of your company.

Process Flow

When you perform the *Changes to Pay* personnel action type, you must note the following points:

- During the course of carrying out the *Change in Pay* personnel action, a data record is stored in the Actions (0000) [Page 59] infotype if an employee's basic pay increases. The date and the reason (standard pay increase, pay scale reclassification, annual increase) for the change in basic pay are stored amongst other things in this infotype.
- The employee's current basic pay changes in the Basic Pay (0008) [Page 82] infotype as well.

Result

You have entered or made all of the necessary changes to the employees' current payments in the system for all the employees whose pay has changed using the personnel action type *Change in Pay*.

Performing Personnel Action Type *Change in Pay* for an Employee

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The *Personnel Actions* screen appears.

2. Enter the employee's personnel number.
3. Enter the date from which the change in basic pay should be effective as the start date for the personnel action.
4. Choose the personnel action type *Change in Pay*.
5. Choose *HR master data* → *Execute*.

   The *Actions* infotype (0000) appears.

   In the standard system, the *Change in Pay* personnel action groups all of the infotypes together that must be processed when you change an employee's pay to form an infotype group [Page 47]. The system automatically displays these infotypes in succession so that you can maintain them.

   When customizing *Personnel Administration* you can adapt the infotypes within the personnel action, and the sequence in which they appear, so that they meet your company's specific requirements. You can also change the infotype group temporarily by using the Change Infotype Group [Page 159] function.

6. Enter a reason for employee's the change in pay in infotype 0000 *Actions*.
7. Choose *Enter* to check your entries.

   Your entries are checked against the data stored in the system. If your entries do not correspond to the data stored in the system, the system displays an error or warning message. In this case, you must correct the entries concerned.

8. Save your entries.

   This automatically takes you to the *Basic Pay* infotype (0008).

   Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel action. You can interrupt a personnel action whenever you want to and restart it at a more appropriate point in time.

   For more information, see:

   Skipping an Infotype During a Personnel Action [Page 157]

   Canceling and Restarting Personnel Actions [Page 160]

The infotypes *Actions* (0000) and *Organizational Assignment* (0001) are affected by integration between the *Personnel Administration* and *Organizational Management* components.

For more information, see:

Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

9. Change the employee's pay.
10. Save your entries.

    After you have saved the last infotype in the infotype group, you return to the initial personnel actions screen.

Result

You have executed the *Change in Pay* personnel action type for an employee.

Leaving

Purpose

A large amount of employee data is stored in the system during the period of employment at your company. This data is stored in individual Infotypes [Page 43].

If the employee leaves your company, certain infotypes must not be changed as they contain data that is used to create histories. Other infotype records must be delimited in the system. Furthermore, you must ensure that the final payroll has run successfully, and that retroactive accounting runs have also been performed, if necessary.

When an employee leaves your company, you administer it using a Personnel Action [Page 153]. The personnel action type *Leaving* only offers you data records for maintenance if they must be edited when an employee leaves the company.

Note, an employee's personnel number must never be deleted when they leave your company.

A distinction must be made between employees who have left the enterprise, and:

- Employees who have retired
- Employees who are absent for a long period of time, for example, for maternity protection or military or non-military service

You enter these types of absence using the Absences (2001) [Ext.] infotype . For more information, see the Inactive Work Relationship [Page 147] section.

Prerequisites

The *Leaving* personnel action type groups various logically related infotypes together to form an Infotype Group [Page 47]. You can use the customizing tool in *Personnel Administration* to adjust the infotype group to the individual requirements of your company.

Process Flow

When you run the *Leaving* personnel action, note the following:

Recording Leaving

If an employee leaves the company, a data record is created in the Actions [Page 59] infotype (0000) during the course of the *Leaving* personnel action type. The leaving date and reason for leaving are stored in this infotype record (for example, employee hands in notice, employer terminates working relationship). The reason for leaving is used for statistics and reporting.

Changing Employment Status

The employee's employment status is automatically changed when the *Leaving* personnel action type is performed. After the employee has left the enterprise, he or she has employment status 0 (left). Payroll recognizes this status and as a result, the employee is not included in the next payroll run. If an employee has *employment status* 0, he or she is also ignored by a large number of evaluations.

Integration with *Organizational Management*

If the *Personnel Administration* component is integrated with the *Organizational Management* component, the employee has have been assigned to a position. If the employee leaves the company, he/she will no longer occupy this position. The employee is automatically assigned a default position when they leave the company.

If the employee's employment status changes to 1 (*inactive*), they retain the old position assignment.

Integration with *Training and Event Management*

If you use *Personnel Administration* together with *Training and Event Management*, note the following special features:

If an employee leaves, the relationships that start after the leaving date are deleted. Relationships that are valid on the leaving date are either delimited (for flags) or remain. The system checks whether billing or allocation documents have already been created for attendances and reservations for the employee. If this is the case, you must decide how to process these relationships. The relationships then remain and are printed in the log with indentifiers. No cancelation record is created for deleted attendances, however, the move-up procedure for participants on the corresponding waiting lists is performed according to Customizing for *Training and Event Management.* For deleted resource reservations, the corresponding resource type for the business event type in question is flagged as open (in other words, not reserved).

If you want to carry out additional processing when the employee leaves, you can use a Business Add-In (BAdI) as a customer enhancement. You can create this customer enhancement in Customizing for *Personnel Management* under *Global Settings in Personnel Management → Special Personnel Actions → BADI: Personnel Actions for Country Reassignments and Leavings.*

From Release 4.6B, SAP only supports the BADI. If you have already implemented the user exit for Release 4.6A in Customizing for *Personnel Management* under *Global Settings in Personnel Management → Special Personnel Actions → User Exit for Special Personnel Actions*, you must transfer this implementation to the BADI in all subsequent releases.

If an error occurs during this data transfer, the transfer can carried out by running the report *Processing Errors According to Country Reassignment* (RHHANDLERELATIONS). To do this, set the *Person-related action* indicator in the *Leaving date* group.

Integration with *Personnel Development*

If you use *Personnel Administration* together with the *Personnel Development* component, the employee data (qualifications, profile, and so on) for *Personnel Development* remains unchanged when the employee leaves.

Delimiting Data Records

- Some infotype data records are not delimited automatically by the system. When you perform the *Leaving* personnel action type, the infotypes that must be delimited, such as *Recurring Payments and Deductions* (0014), *Additional Payments* (0015), and *Time Recording Info*

(0050), are displayed automatically on a list screen. The list screen enables you to delimit the infotypes.

- All other data, such as organizational data, personal data, addresses, and basic payroll data in particular, must remain in the system. The corresponding data records must not be delimited. This data is required if the employee receives a back payment (overtime, leave compensation, and so on) after his or her last payroll run, or if you need to write to the employee. In addition to this, this data is also required for evaluation purposes.

  The *Basic Pay* infotype (0008) must not be delimited. Basic payroll data must remain in the system. This is the only way of ensuring the accuracy of any retroactive accounting runs that need to be performed.

Paying Employees Who Have Left Your Company

Payroll recognizes that an employee has left from the employment status 0. Employees with employment status 0 are not selected in the payroll status. If you want to remunerate the employee once he or she has left the company, you can do this using the infotypes Recurring Payments and Deductions [Page 89] (infotype 0014) or Additional Payments [Page 85] (infotype 0015). Note, in this case you have to store the date in the *Run payroll up to* field in the Payroll Status [Page 81] infotype; the employee who left the company will then be paid up until this date.

See also:

Changing the Payroll Status [Page 195]

Notifying the Relevant Administrator About an Employee Leaving the Company

An employee often has objects on loan, a company ID, or a system user that must be returned after they leave. In such instances, it is a good idea to inform the appropriate administrator that the employee is leaving the company. In *Personnel Adminstration* customizing you set up an automatic e-mail connection using a Dynamic Action [Page 176] so that an e-mail is sent using SAP Office to the relevant administrator as soon as a corresponding infotype is processed.

Result

You have changed or delimited all of the necessary data in the system for all the employees leaving your company using the personnel action type *Leaving*.

Performing the *Leaving* Personnel Action Type for an Employee

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The *Personnel Actions* screen appears.

2. Enter the employee's personnel number.

3. Enter the date on which the employee left or is intending to leave the enterprise as the start date of the personnel action.

4. Choose the *Leaving* personnel action type.

5. Choose *HR master data* → *Execute*.

   The *Actions* infotype (0000) appears.

   In the standard system, the *Leaving* personnel action type groups all of the infotypes together that must be processed or delimited when an employee leaves the enterprise to form an infotype group [Page 47]. The system automatically displays these infotypes in succession so that you can maintain them.

   When customizing *Personnel Administration* you can adapt the infotypes within the personnel action, and the sequence in which they appear, so that they meet your company's specific requirements. You can also change the infotype group temporarily by using the Change Infotype Group [Page 159] function.

6. Enter the employee's reason for leaving in the *Actions* infotype (0000).

   If the *Personnel Administration* component is integrated with the *Organizational Management* component the employee is automatically assigned a default position when they leave. At this point, a dialog box appears. It enables you to determine that the position occupied by the employee up to his or her leaving is now vacant.

   When an employee leaves the enterprise, the system automatically sets the value in the *Employment status* field to 0 (= left). This ensures a correct final payroll run.

7. Choose *Enter* to check your entries.

   Your entries are checked against the data stored in the system. If your entries do not correspond to the data stored in the system, the system displays an error or warning message. In this case, you must correct the entries concerned.

8. Save your entries.

   The next infotype is automatically displayed. By running the *Leaving* action, the system will automatically display all the infotypes that must be delimited.

9. Delimit the displayed infotype records as of the required date.

Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel action. You can cancel the personnel action at any time, and restart it at a suitable juncture.

For more information see:

Skipping an Infotype During a Personnel Action [Page 157]

Canceling and Restarting Personnel Actions [Page 160]

After you have delimited the last infotype in the infotype group, you return to the initial personnel action screen.

Result

You have performed the *Leaving* personnel action type for an employee.

Inactive Work Relationship

An inactive work relationship is a work relationship that has been interrupted for specific reasons, but which has not been terminated. For example, maternity protection, parental leave, and military or non-military service. During this period of time, the employee can be entitled to payments such as the Christmas bonus, or vacation allowances.

The difference between leaving the enterprise and having an inactive work relationship is that an employee with an inactive work relationship must return to work after a certain period of time. If an employee does not return to work after parental leave, for example, you must perform the *Leaving* personnel action type for this employee.

In Germany, the best way to portray an inactive work relationship is to use the Absences (2001) [Page 59] infotype instead of using the Actions (0000) [Ext.] infotype. By doing so, you can decide whether the employee is paid during the absence or not.

For further information please see the *PT - Personnel Time Management.*

If you enter an inactive work relationship in the system by entering an extended absence, the employee retains employment status 3 (active). This means that you cannot use the employment status as a selection criterion to prevent the employee from being included in a report run.

Sometimes, an employee who has an inactive work relationship may work at your enterprise on an hourly basis, such as during parental leave. In such instances, it is a good idea to hire the employee for such part-time activities using a different personnel number. This enables you to keep both work relationships separate. The employee's entitlements from the inactive work relationship can be taken fully into account.

Reentry into Company

Purpose

In the system, you can perform the re-admission of an employee who previously left your company with a Personnel Action [Page 153].

All of the infotypes that you have process when re-hiring someone appear automatically and sequentially in the personnel action type *Reentry into Company*.

Prerequisites

The *Reentry into Company* personnel action type groups various logically related infotypes together to form an infotype group [Page 47]. You can use the customizing tool in *Personnel Administration* to adjust the infotype group to the individual requirements of your company.

Process Flow

When you perform the *Reentry into Company* personnel action type, you must note the following points:

Process Reentry into Company

When an employee who previously left your company reenters it, a data record is stored in the infotype Actions (0000) [Page 59] whilst you execute the personnel action type *Reentry into Company*. You store the date and the reason for reentering the company in this infotype record, amongst other things.

As all of the previously valid data for an employee remains in the system even after they have left the company, you have to enter a lot less data when they reenter the company, than you did when the first started at the company.

Integration to Organizational Management

If the *Personnel Administration* component is integrated with the *Organizational Management* component, you can link the data about the employee's organizational assignment in *Organizational Management* to the data about the position. This relationship determines how infotypes 0000 *Actions* and 0001 *Organizational Assignment* are processed.

For further information see the following sections:

The Personnel Structure From the Organizational Perspective [Page 37]

Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

Result

You have entered or changed all of the necessary data in the system for all the employees returning to your company using the personnel action type *Reentry into Company*.

Performing the *Reentry into Company* Personnel Action Type for an Employee

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The *Personnel Actions* screen appears

2. Enter the employee's old personnel number.

3. Enter the date on which the employee returns to your company as the start date for the action.

4. Choose the personnel action type *Reentry into Company*.

   If the *Personnel Administration* component is integrated with the *Organizational Management* component, the information on the *personnel area, employee group* and *employee subgroup* is linked with *position.* In this instance, do not process these fields here, instead process the field *Position* in the infotype *Actions* (0000).

5. Choose *HR master data* → *Execute*.

   The *Actions* infotype (0000) appears. If the employee has a permanent work relationship, do not change the default end date.

   In the standard system, the *Reentry into Company* personnel action groups all of the infotypes together that must be processed when an employee re-enters your company to form an infotype group [Page 47]. The system automatically displays these infotypes in succession so that you can maintain them.

   When customizing *Personnel Administration* you can adapt the infotypes within the personnel action, and the sequence in which they appear, so that they meet your company's specific requirements. You can also change the infotype group temporarily by using the Change Infotype Group [Page 159] function.

6. Enter a reason for the employee re-entering your company in infotype 0000 *Actions*.

7. You can check your entries by pressing enter.

   Your entries are checked against the data stored in the system. If your entries do not correspond to the data stored in the system, the system displays an error or warning message. In this case, you must correct the entries concerned.

8. Save your entries.

   The next infotype is automatically displayed. There, the information that was previously valid for the employee is displayed. You can take on these values or change them.

   Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel

action. You can interrupt a personnel action whenever you want to and restart it at a more appropriate point in time.

For more information, see:

Skipping an Infotype During a Personnel Action [Page 157]

Canceling and Restarting Personnel Actions [Page 160]

The infotypes *Actions* (0000) and *Organizational Assignment* (0001) are affected by integration between the *Personnel Administration* and *Organizational Management* components.

For more information, see:

Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

After you have saved the last infotype in the infotype group, you return to the initial personnel actions screen.

Result

You have executed the *Reentry into Company* personnel action type for an employee.

Procedures in Personnel Administration

The following sections explain how the various *Personnel Administration* functions support you whilst carrying out activities in a modern Personnel Administration.

See also:

Personnel Actions [Page 153]

Selecting Human Resource Data [Page 162]

Processing Human Resource Data [Page 173]

Time Constraints in HR Master Data [Page 234]

Connection to the Resumix® Recruitment System [Page 236]

Connection to Partner Recruitment Systems [Page 239]

Personnel Actions

In the standard system, different types of employee data are stored in individual infotypes [Page 43]. Rather than accessing each infotype individually and entering data into them, the system can group together the most important infotypes into personnel actions and lead you through processing the employee data.

Personnel actions

Personnel procedures, such as hiring an employee, organizational reassignment, or an employee leaving the enterprise are represented by individual **personnel actions** in *Personnel Administration*. Each personnel action contains the infotypes that you must maintain to record the personnel action at hand. The infotypes are retrieved in succession so that you can maintain them. For example, all the fields in which you need to make entries to hire an employee will be offered to you for maintenance automatically by the system in the personnel action *Hiring*.

This ensures that all the core data is entered into the system. This function also facilitates entering data as you do not need to access each infotype within the personnel action individually.

Customizing enables you to adapt the *Hiring* personnel action type so that it meets your enterprise's exact requirements:

- In the standard system, the *Organizational reassignment* personnel action groups logically related infotypes together to form an infotype group [Page 47]. These sequence in which these infotypes are presented guarantees that you can carry out all personnel procedures in logical order for an employee. If you want to display all of the infotype records that are valid for an employee on the start date of a personnel action, choose Scrolling Through an Infotype Group [Page 158].

  If you want to enter additional employee data using the hiring action, you can change these infotype groups by customizing the standard system settings. You can also change the infotype group temporarily by using the Change Infotype Group Temporarily [Page 159] function.

- Changes made to an infotype or infotype fields often affect field entries in other infotypes. You can set up **dynamic personnel actions** in the system settings to deal with situations like this.

- Employees are often in possession of objects on loan, company ID cards, or system users that must be returned when, for example, they become subject to an *organizational reassignment* or *leave* the enterprise. In such cases, it is a good idea to inform the appropriate administrator of the O*rganizational Reassignment*, or of the fact that an employee has left the company, so that he or she can initiate the necessary steps. In Customizing, you can set an **automatic mail connection** so that the administrator responsible automatically receives a mail via SAPOffice if an infotype record is edited.

In the standard SAP System, the following basic personnel procedures are represented as personnel actions in the HR master data system:

- Hiring
- Organizational reassignment (for employees who are promoted, for example, or demoted, or transferred to an equivalent work center)
- Early retirement/retirement
- Leaving

- Reentry into company

Based on the advantages given above, SAP recommends that you always use the *Personnel action* function to perform these business procedures.

See also:

Performing a Personnel Action [Page 155]

For more information on the *Hiring, Organizational Reassignment,* and *Leaving* actions, see:

Hiring a New Employee [Page 105]

Organizational Reassignment of an Employee [Page 129]

Leaving The Enterprise [Page 142]

Fast entry of personnel actions

The *Fast Entry of Personnel Actions* function is available for some actions. This function enables you to carry out a personnel action for one employee. There are several required entry fields that you must fill on the Fast Entry screen in order to carry out a personnel action. You can enter all the important data for the individual employee that is not derived from the default values. Using these entries as a basis, the system will fill all the other fields with default values (for example, if you make an entry in the required entry field *Position,* the system will automatically suggest a default value for the field *Payroll accounting area).*

When you use the *Fast Entry of Personnel Actions* function, the system does not display the fields for which default values are suggested automatically. The advantage of this function is that you can maintain all the required entry fields for all the infotypes belonging to a particular personnel action on one screen. This prevents you from having to maintain all of the fields included in the infotypes assigned to the personnel action.

In the standard system, you can only use the *Fast Entry of Personnel Actions* function for the following actions:

- Hiring
- Organizational reassignment

In the Implementation Guide for *Personnel Administration,* you have the option of customizing the *Fast Entry of Personnel Actions* function to suit your company-specific requirements. You can set up your own fast entry screens for all the personnel action types you require by determining the content and layout of the screens.

See also:

Using Fast Entry of Personnel Actions for an Employee [Page 161]

Performing a Personnel Action

Performing a personnel action means maintaining a predefined sequence of infotypes for a particular employee.

The system creates a relevant record in the *Actions* infotype (0000) for most personnel actions. In this infotype, you enter the personnel action type, the reason for the action, and the employee's employment status. This data is important for managing employee data. All infotypes that belong to this personnel action's infotype group are called up.

Even if you do not have all the data that must be entered in the system, you can still run the action and then skip the individual infotypes whilst still in the personnel action. You can interrupt a personnel action whenever you want to and restart it at a more appropriate point in time.

For more information, see:

Skipping an Infotype During a Personnel Action [Page 157]

Canceling and Restarting Personnel Actions [Page 160]

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The *Personnel Actions* screen appears.

2. Enter the employee's personnel number and the date from which the personnel action is valid.

   The system automatically transfers this information to all of the infotype records in the personnel action.

   For most personnel actions you may enter the employee's *Personnel area*, *Employee group*, and *Employee subgroup* at this stage. The system transfers this information to the *Organizational Assignment* infotype (0001).

   The infotypes *Actions* (0000) and *Organizational Assignment* (0001) are affected by integration between the *Personnel Administration* and *Organizational Management* components.

   For more information, see:

   Processing Actions Infotype (0000) if Organizational Management is Integrated [Page 113]

   Processing Organizational Assignment Infotype (0001) if Organizational Management is Integrated [Page 114]

3. Choose the personnel action type you want to process.

4. Choose *HR master data* → *Execute*.

   The *Actions* infotype (0000) appears.

5. Make entries in all the required entry fields. You can overwrite the default values.
6. Save your entries.

   The system automatically displays the next infotype. Make entries in all the required entry fields. Save your entries. The system guides you through the different infotypes that are relevant for creating personnel actions. You end each individual activity by choosing *Save*. After you have saved the last infotype in the personnel action, you automatically return to the initial *Personnel Actions* screen. The action is now complete.

   For more information on the personnel action types *Hiring*, *Organizational reassignment*, *Change in pay*, *Leaving*, and *Reentry into company*, see:

   Hiring a New Employee [Page 105]

   Organizational Reassignment of an Employee [Page 129]

   Change in Pay [Page 139]

   Leaving The Enterprise [Page 142]

   Reentry into Company [Page 148]

Result

You have run a personnel action for an employee.

Skipping an Infotype During a Personnel Action

When you perform the Running Personnel Actions [Page 155] activity, you may find that you do not have all of the data that you require to finish maintaining the infotypes included in the action. In this case, you can skip an infotype to complete the personnel action.

Procedure

1. On the screen of the infotype that you want to skip, choose *Goto* → *Next record*.

   The system displays a dialog box warning you that you are leaving a screen without saving data. It asks you if you wish to exit the current screen.

2. Choose *Yes*.

   The system displays the next infotype record for this personnel action.

Result

You have skipped an infotype during a personnel action.

Scrolling Through the Infotype Group

Procedure

If you want to scroll through the infotype group of a personnel action for an employee, proceed as follows:

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

   This takes you to the *Display HR Master Data* screen.

2. Enter the employee's personnel number and select the infotype *Actions* (0000).

3. Select *Edit* → *Display.*

   This takes you to the screen *Display Actions (Infotype 0000)*.

4. Choose *Goto* → *Scroll through info group.*

   This takes you to the currently valid infotype record of the first infotype in the infotype group.

5. To access the next record, choose *Goto* → *Next record.* To go back to the previous record, choose *Goto* → *Previous record.*

   If you want to display a list of all valid infotype records for an infotype and its subtypes, choose *Goto* → *Overview.* If you want to display one of the infotype records in this list, select the required data record and choose *Display*.

Result

After you have scrolled through all of the valid data records for an employee, you return to the *Display Actions (Infotype 0000)* screen.

Changing an Infotype Group Temporarily

Prerequisites

The infotype group for a personnel action stores the sequence and selection of infotypes that must be maintained for that particular personnel action. You can modify the grouping using Customizing. You can temporarily change the infotype group of a personnel action that you are currently executing.

You want to hire an employee. You must also enter the data that is not included in the personnel action in the system (for example, the infotype *Challenge* (0004)). When you run the hiring action for the employee, these infotypes should also be offered for maintenance. To do this, use the function *Change infogroup* to change the personnel action *Hiring* infotype group.

Changes made using the function *Change infogroup* are only temporary. As soon as you have completed the personnel action, the changes are cancelled automatically.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   You are now in the *Personnel actions* screen.

2. Assign a personnel number and choose a personnel action.
3. Choose the *Enter* function.

   The system displays the *Actions* (0000) infotype screen.

4. Make an entry in all the required entry fields.
5. Choose *Change info group*.

   The system displays a dialog box that lists in order the infotypes that belong to the infotype group that you have called up during the personnel action.

6. Change the info group.
7. Choose *Save.*
8. Continue with the personnel action.

   You have temporarily changed the infotype group for an action.

Restarting an Interrupted Personnel Action

You may exit a personnel action at any time during processing without losing the data that you have already entered in infotypes that have already been processed. This allows you to continue with the remainder of the personnel action at a later stage and complete it.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.

   The *Personnel Actions* screen appears.

2. Enter the employee's personnel number and the date from which the personnel action is valid.

3. Select the personnel action that you previously canceled.

4. Choose *HR master data* → *Execute*.

   The *Actions* infotype (0000) appears.

5. Select *Goto* → *Execute infogroup*.

   The system displays a dialog box which shows you that the data that you have created in the *Actions* screen will not be saved if you use the *Execute infotype group* function.

6. Choose *Continue*.

   The system automatically displays the next infotype for this personnel action.

7. Proceed through the personnel actions selecting the *Goto* → *Next record* function until you reach the infotype that you ended with previously.

   When you go through the already edited infotypes, you can edit them as necessary. When you reach the infotype at which you originally canceled the personnel action, the system automatically switches to *Create* mode.

8. Proceed with the personnel action.

9. Save your entries.

   The system automatically displays the next infotype.

   When you save the last infotype in the infotype group, the system takes you back to the initial personnel actions screen.

Result

You have restarted and completed an interrupted personnel action.

Using Fast Entry of Personnel Actions for an Employee

In a fast entry action, only the required fields for each infotype record are displayed for you to enter data. You can, however, add further data to infotypes once you have saved the fast entry action. After you have exited the fast entry screen, you access the specified infotype, which enables you to add your additional data. Furthermore, the system automatically displays the individual infotype screens in which you have entered incorrect data.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry: Actions*.
2. Enter the start date of the validity period for the personnel action.
3. Choose the action that you require.

   In addition, you can enter the required information in the fields *Personnel area, Employee group, and Employee subgroup* for the employee.

   If Personnel Planning and Development (PD) has been implemented, the information on the *personnel area, employee group* and *employee subgroup* is linked with *position.* If this is the case, do not maintain these fields on this screen. Instead, you must maintain the *Position* field on the fast entry screen.
4. Choose *Execute*.

   You see the *Fast Data Entry for Action " "* screen (" " will be the name of the action you selected). The required fields for the infotypes which define the personnel action are also displayed.
5. Enter the relevant data.

   The information is stored in the appropriate infotype records.

   If you want to add additional data in to an infotype, select the check box *Further infotype data* for the corresponding infotype. After you have saved the last infotype in the infotype group, you return to the initial screen for this infotype.
6. Save your entries.

   If you enter incorrect data, or if you forget to enter data in a required field, the system displays the infotype record with an error message.

You have run an action using the *fast entry of personnel actions* function.

Selecting Human Resource Data

This section explains how to access employee data in the Human Resource Management System. We will show you how to select data directly and how to use the various menus.

A large amount of data in the Human Resource Management System is stored in infotypes [Page 43]. To access employee data, you must enter the employee's personnel number and the infotype whose data records need to be maintained.

You can access personnel numbers even if you do not know them by using the Search Help for Personnel Numbers [Page 163] .

After you have found the employee you require, you can access the infotype records that are available as follows:

- Selecting a known infotype

  Each infotype has both a name and a number. If you know either of these, you can enter it in the *Infotype* field.

  - Selecting an infotype using the infotype menu

    The Human Resource Management System contains a number of infotype menus that group infotypes together by subject matter. For example:

    – *Basic personal data*

    – *Basic contract data.*

    – *Planning data*

    – *Time management data.*

    You can use the menu for a particular area within Human Resources to access the infotype that you want to maintain.

  - Selecting an infotype using a generic or masked text search

    The system can also create dynamic menus for you. If you enter a search term in the *Infotype* field, the system displays a selection menu listing all of the infotypes whose name includes the search term.

- Selecting an infotype using the personnel file

  The personnel file is a reference tool that you can use to view all of the infotype records stored in the system for a particular employee.

See also:

Using the Search Help for Personnel Numbers [Page 163]

Selecting a Known Infotype Record [Page 168]

Retrieving an Infotype Menu [Page 169]

Creating Dynamic Menus [Page 170]

The Personnel File [Page 171]

Using the Search Help for Personnel Numbers

Use

Search help for personnel numbers enables you to access personnel numbers even if you do not know them. There are many types of search help available for the field *Personnel number*. You access them by calling up the input help. Select the type of search help you want (e.g. *Last name - First name*) and enter the corresponding data. The system selects the personnel data according to the information you have entered, and produces a list. You can then select the employee you require from this list. The system then writes the selected person's personnel number in the field *Personnel number*.

Prerequisites

Search help is available under the standard settings. You can use these types of search help or you can add to them to meet your company's requirements.

To find out how you define search help, see *Personnel Administration* → *Basic Settings* → *Maintain Search Help* in the Implementation Guide (IMG).

Features

When you have the possibility to call up search help for personnel numbers it is bound to the relevant transaction that you are currently in. Some transactions are delivered in the standard system with the search help functionality. As a rule, there are fewer search helps in HR master data maintenance than in a report transaction.

The following search help types are set up for HR master data maintenance in the standard system:

- Last name - first name
- Organizational assignment
- Personal identification number

The following additional search help types are set up for reporting in the standard system:

- PDC Error Indicator
- Part-time employees (Germany only)
- Buyer
- Birthday
- Sickness certificate data (Austria only)
- Administrator time
- Date/Deadline
- Employee's applicant number
- Personnel number with trip data according to org. assignment
- Personnel number with trip data
- System user name

Using the Search Help for Personnel Numbers

- Sales personnel
- Correction run - payroll
- Interface-Toolkit: export program
- PDC group
- PDC time recording ID card

For more detailed information about search help, see the *Basis* documentation under Search Help [Ext.].

See also:

Using the Search Help for Payroll Correction Run [Page 165]

Using the Search Help for PDC Error Indicator [Page 166]

Execute Search Help for Personnel Numbers [Page 167]

Using Search Help for Payroll Correction Run

Use

You can select all of the personnel numbers that had errors during payroll and re-run payroll for them using the search help *Correction Run for Payroll*. You can call up the search help using the input help for the field *Personnel number* in a report used for payroll.

Features

The system sets the indicator *Payroll correction* in the *Payroll Status* infotype (0003) for all personnel numbers where errors occurred during a payroll run. The personnel numbers for which errors occurred are automatically transferred to the search help *Payroll Correction Run*. You can call up these personnel numbers using the search help and carry out a new payroll run. The system deletes the correction indicator in the *Payroll Status* infotype (0003) if the payroll has run without problems.

Using the Search Help for PDC Error Indicator

Use

You can select all of the personnel numbers that encountered errors in the time evaluation report and re-evaluate them using the search help *PDC error indicator*. You can call up the search help using the input help for the *Personnel number* field in the time evaluation report *HR TIME - Time Evaluation* (RPTIME00).

Features

The indicator *PDC Error Indicator* is set in the *Payroll Status* infotype (0003) for all the personnel numbers that cause errors during the time evaluation report's runtime. The personnel numbers with errors are automatically transferred to the search help *PDC error indicator*. You can call up these personnel numbers using the search help and carry out a new time evaluation. The system deletes the correction indicator after the posting run for those personnel numbers that no longer contain errors in the *Payroll Status* infotype (0003).

Execute Search Help for Personnel Numbers

Use

You want to determine a personnel number. Call up the input help for the field *Personnel number* and execute a suitable search help. The system determines the personnel number you want.

Procedure

1. Call up the input help for the *Personnel number* field.
2. Select the desired tab page on the tab strip (e.g. *Last name - previous name*). Each tab page represents an individual search help.

   The system displays the corresponding fields ready for input according to the selected search help; you can then fill in the corresponding fields.

   Note, you do not have to make an entry in all of the fields that appear on the selected search help. You can also make a generic (e.g. *M**) or a masked entry (e.g. *M++er*).

   Note, you can delimit the value area for most types of search help. The system defaults a value. You can overwrite this value.
3. Choose *Start search*.

   The system displays a list of values that correspond to the selected search string.
4. Select the value you want from the value list and choose *Copy*.

   The system enters the corresponding personnel number in the field.

Result

You have called up a value list using search help for personnel numbers and selected the employee you are looking for from that list. The system then transferred the selected employee's personnel number in the field *Personnel number*.

Selecting a Known Infotype Record

Use

If you know the name or number of an infotype you want to access, you can call it up from the *Display HR Master Data* or *Maintain HR Master Data* screen.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain* or *Display.*

   The system displays either the initial maintenance or display screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or enter the name/number of the infotype directly in the field *Infotype*.
4. If necessary, enter the number of a subtype.
5. Choose the processing method you want to use.

   The currently valid record is displayed, unless you enter a different validity period.

Result

You have selected a known infotype record.

Calling Up The Infotype Menu

The most frequently used infotypes in the HR System are grouped together by subject matter to form infotype menus.

These menus appear as tab strips on the user interface. You can access a menu by selecting the relevant tab strip. You can also display additional menus from here.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain* or *Display.*

   The system displays either the initial maintenance or display screen for HR master data.

2. Choose the desired tab strip.

   The infotypes that belong to this menu are displayed by the system.

3. If you want to display other menus, choose *Forward* or *Back.*

Result

You have called up an infotype menu.

Creating Dynamic Menus

If you want to retrieve infotypes on a specific subject, you can request the system to create an appropriate menu.

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain* or *Display.*

   The system displays either the initial maintenance or display screen for HR master data.

2. In the *Infotype* field, enter a word or text string.
3. Choose *Enter*.

The system displays all infotypes whose word or text string begin with that title. You can then select the infotype that you require from this menu.

Enter *Attendance* to display a list of infotypes that start with this string. This enables you to call up all of the infotypes that are relevant to attendance data processing.

Personnel File

Use

You can use this function to “scroll” through an employee’s personnel file. The system displays all of the data stored on an employee in the various Infotypes [Page 43]. The infotypes are displayed in ascending numerical order, and the records stored in the infotypes are displayed according to their validity periods.

The same display order applies to Infosubtypes [Page 45]. Infosubtype records are displayed after infotype records.

Displaying the Personnel File

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel File*.

   The system displays the *Personnel File* screen.

2. Enter the employee's personnel number.
3. Choose *Display.*

   The system displays the current valid irecord in infotype *Actions* (0000).

4. Choose *Next record* to proceed. Choose *Previous record* to go back.

   If you want to display a list of all valid infotype records for an infotype and its subtypes, choose *Overview.* If you want to display one of the infotype records in this list, select the required infotype record and choose *Display*.

Once you have viewed all the infotype records, return to the Personnel file initial screen.

Result

You have displayed an employee's personnel file.

Processing Human Resource Data

The Human Resource Management System stores data in infotypes. You must change and complete these infotypes in order to keep the employee data up to date and to take into account changes and developments that have taken place since the employee has entered the enterprise.

Before you process employee data, you must enter the employee's personnel number and select the infotype that needs to be maintained. You can find further information on this topic under Selection of HR Data [Page 162]. You can choose between the following processing types:

- Maintenance
- Display
- Fast entry

See also:

Maintaining HR Master Data [Page 174]

Displaying HR Master Data [Page 201]

Fast Entry of HR Master Data [Page 208]

When you update an infotype, old data is not lost but archived for historical evaluation. The system records a specific period of validity for each infotype record. Several records for an infotype can therefore exist in the system simultaneously. These records differentiate themselves from each other by their validity period.

So that you can simultaneously store several infotype records, you must define time relationships between the records. This is accomplished by the system using time constraints.

See also:

Time Constraints in HR Master Data [Page 234]

Maintaining HR Master Data

You can change existing infotypes and create new infotype records for employees. You create a history of data changes and developments during the period that an employee works at an company.

- **Change**

  The *Change* function enables you to correct an existing record without creating a new one. You overwrite the old one. When an infotype record is changed, its history is not updated.

  See also:

  Changing a Current Infotype Record [Page 177]

  Changing a Previous Record [Page 179]

- **Delete**

  The *Delete* function allows you to delete existing infotype records from the database. If you delete infotype records with time constraint 1, the previous record is automatically extended. An infotype history is created using the definition of the validity period.

  See also:

  Deleting a Current Infotype Record [Page 180]

  Deleting a Previous Record [Page 182]

- **Create**

  The *Create* function allows you to enter new data. A new record is created while retaining the old record. The infotype history is generated by defining the validity periods.

  See also:

  Creating an Infotype Record [Page 183]

- **Copy**

  The *Copy* function also creates new infotype records, and as a result, the infotype history is updated. Here, unlike the *Create* function, data is not entered on an empty screen, but on a screen containing the current data. You can then overwrite these values.

  See also:

  Copying an Infotype Record [Page 185]

  If you make changes to an infotype record that affects a second infotype record, i.e. changes must be made to the second infotype record, the system will automatically offer you this infotype for maintenance. These are known as **dynamic actions** which are automatically triggered by the system and not by the user as is the case for personnel actions.

  You can set up your own dynamic actions in the standard settings to deal with situations like this.

In some cases, changes to an employee's payroll-related master data can trigger a retroactive accounting run.

See also:

Maintaining Payroll-Related Master Data [Page 190]

Dynamic Actions

Definition

Dynamic actions trigger automatic processing when infotypes are maintained.

Use

If you make a change to the personnel data of an infotype that then has an effect on the data of a second infotype, the system automatically displays the infotype. The *Personnel Administration* component guarantees a consistent data retention at all times.

These dynamic actions are started automatically by the system, unlike the Personnel Actions [Page 153] which you start by yourself. Dynamic actions assist you with many human resource processes which lead onto further activities.

In *Personnel Administration* customizing you can set up user defined processing chains which are suited to your company's conditions.

Changing the Current Infotype Record

Do not change organizational assignment data in the Organizational Assignment (0001) [Page 65] infotype. Instead, make the necessary changes during the Organizational Reassignment [Page 129] personnel action type.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or enter the name/number of the infotype directly in the field *Infotype*.

   If you do not know the exact name or number of the infotype record you want to change, and if it does not appear in the infotype selection list, read the Selecting HR Data [Page 162] section.

4. If necessary, enter the number of a subtype.
5. Select *Edit* → *Change*.

   The system displays the current infotype record in the change mode.

6. Make your changes.
7. Save your entries.

Result

You have changed the current infotype record.

See also:

Correcting an Employee's Address Details: Example [Page 178]

Correcting an Employee's Address Details: Example

Prerequisites

You have performed the *Hiring* action for a new employee, but have not yet entered all of the data required for the *Addresses* infotype (0006) because the employee has not supplied you with all of the relevant information. In the meantime, you have been given the complete details and need to correct the employee's current *Addresses* record (infotype 0006).

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
2. Enter the employee's personnel number.
3. Choose the current *Addresses* record (infotype 0006) by entering the name or number in the *Infotype* field.
4. Choose *Change*.

   The current *Addresses* infotype record is displayed in copy mode.
5. Make the required changes.
6. Save your entries.

You have changed the employee's address data.

Changing a Previous Record

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose record you want to change in the *Infotype* field.

   If you do not know the exact name or number of the infotype record you want to change, and if it does not appear in the infotype selection list, read the Selecting HR Data [Page 162] section.

4. Select *Goto* → *Maintain overview*.

   A list of all available data records for the infotype is displayed.

5. Select the previous record that you want to change.
6. Select *Edit* → *Change*.

   The infotype record is displayed in change mode.

7. Make your changes.
8. Save your entries.

Result

You have changed the previous record.

Deleting a Current Infotype Record

If you want to perform an historical evaluation at a later date, you must activate the general log system. A document is created that records the deletion of the infotype record.

For more information, refer to Reports for Creating Documents [Page 414] .

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose record you want to delete in the *Infotype* field.

   If you do not know the exact name or number of the infotype record you want to delete, and if it does not appear in the infotype selection list, read the Selecting HR Data [Page 162] section.

4. Select *Edit* → *Delete*.

   The system displays the current infotype record in the delete mode.

5. Select *Infotype* → *Delete*.

Result

You have deleted the current infotype record.

See also:

Deleting an Incorrect Infotype Record: [Page 181]

Deleting an Incorrect Infotype Record: Example

Prerequisites

Two employees working at your enterprise have the same name. You have entered an infotype record for one of them in the *Family/Related Person* infotype (0021). Later, you realize that you have entered this information for the wrong employee. As a result, the record must be deleted.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
2. Enter the employee's personnel number.
3. Choose infotype 0021 *Family/Related Person* by entering the name or the number of the infotype in the *Infotype* field.
4. Choose the *Emergency contact* subtype code (7).
5. Choose *Delete.*

   The infotype record is displayed in delete mode.
6. Choose *Delete* again.

The incorrect *Family/Related Person* (0021) infotype record is deleted.

Deleting a Previous Record

Procedure

9. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

10. Enter the employee's personnel number.

11. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose record you want to delete in the *Infotype* field.

    If you do not know the exact name or number of the infotype record you want to delete, and if it does not appear in the infotype selection list, read the Selecting HR Data [Page 162] section.

12. Select *Goto* → *Maintain overview*.

    A list of all available data records for the infotype is displayed.

13. Select the previous record that you want to delete.

14. Select *Edit* → *Delete*.

    The infotype record is displayed in delete mode.

15. Select *Infotype* → *Delete*.

Result

You have deleted the previous record.

Creating Infotype Records

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose record you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype record you want to display, and if it does not appear in the infotype selection list, please read the Selecting HR Data [Page 162] section.

4. If necessary, enter the number of a subtype.
5. Choose *Edit* → *Create*.

   The infotype record is displayed in create mode.

- Make entries in the fields that require them and in any other fields that are relevant for you.
- Save your entries.

Result

You have created a new infotype record.

See also:

Changing an Employee's Address:Example [Page 184]

Changing an Employee's Address: Example

Prerequisites

An employee informs you that he or she has moved house, or is going to move house. A record of his/her current address exists in an infotype in the system. To ensure that a history is created in the system, you must create a new record for his/her new address. The *Permanent residence* subtype in the *Addresses* infotype (0006) has the time constraint 1, which means that the system automatically delimits the existing record at the start date of the new record.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
2. Enter the employee's personnel number.
3. Choose the current *Addresses* record (infotype 0006) by entering the name or number of the infotype in the *Infotype* field.
4. Choose *Create*.

   The *Permanent residence* subtype of the *Addresses* infotype is displayed in the create mode.
5. Enter the employee's new address data.
6. Save the infotype record.

The employee's change of address is recorded in the system.

Copying an Infotype Record

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose record you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype record you want to display, and if it does not appear in the infotype selection list, please read the Selecting HR Data [Page 162] section.

4. If necessary, enter the number of a subtype.
5. Select *Edit* → *Copy*.

   A copy of the currently valid infotype record is displayed.

6. Overwrite any changes to the record.

   You must overwrite the default value for the validity period. Otherwise, the copied infotype record is overwritten by the new data during saving.

7. Save your entries.

Result

You have created a new infotype record using the *Copy* function.

See also:

Changing an Employee's Basic Pay Using The Copy Function: Example [Page 186]

Changing an Employee's Basic Pay Using the Copy Function: Example

Prerequisites

An employee in your enterprise receives an increase in basic pay. You record the increase in *Basic Pay* (infotype 0008) Most of the data in the current record is still valid. To save time and to avoid errors, you record the pay increase by copying the existing record and changing the copy.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.
2. Enter the employee's personnel number.
3. Select the current *Basic Pay* record (infotype 0008) by entering the name or number of the infotype in the *Infotype* field.
4. Choose *Copy.*

   The current *Basic Pay* record is displayed in copy mode.
5. Enter the start date of the new record.

   You must enter a start date for the increase in payments. Otherwise, the copied infotype record is overwritten by the new data during saving.
6. Enter the new payment.
7. Save your entries.

Result

The employee's pay increase is recorded in a new *Basic Pay* infotype (0008).

Phoning an Employee from Master Data Processing

Use

This function enables you to directly call an employee from HR master data processing using **SAPphone**. This means that instead of searching for and manually dialing the employee's telephone number, you only have to click the mouse a few times.

Prerequisites

Before you can use this function, work-center-specific, user-specific settings that are valid for the whole client must be in place.

For more information on SAPphone, see the documentation *BC - Basis* → *BC-SAPphone* → *Telephone Integration with SAPphone*.

Features

The phone call to the employee starts, ends, and is processed in the SAPphone dialog box in the *Personnel Administration* component.

The SAPphone dialog window offers the following functions:

- *Dial*

  The *Dial* function initiates the call. The telephone number is passed on to the telephone system which will connect you to the employee's telephone number. Only your telephone indicates whether the call has been accepted, or if the line is busy.

- *Dial and close*

  The *Dial and Close* function initiates the call as above. However, the dialog box is closed immediately afterwards. It is then no longer possible to create notes or end the conversation, for example, from the dialog box.

- *Note*

  With the *Note* function, you can create SAP*office* documents and store them in a folder. After selecting a folder, you can create a document and enter the text. Once you have saved the document, the phone call is linked to the document, i.e. you can initiate the call from the document by a double-click on the appropriate attachment.

  You can call up this function during an ongoing conversation. The phone call is not affected.

- *Start application*

  You can use the function *Start application* to carry out activities that have been designated as being suitable for the SAPphone outbox. The activities transfer the data available in the SAPphone dialog box and can be used, for example, to follow up a phone call. You receive a list of tasks that you are authorized to perform.

- *Refresh*

  With the *Refresh* function, you can adapt the content of the SAPphone dialog box to possible changes in the telephone number or country indicator.

- *Close*

By selecting the *Close* function, you leave the dialog box. A previously initiated dialing procedure or conversation is not interrupted, and saved notes are not deleted.

Activities

You call up the function *Call employee* via a menu entry in HR master data maintenance.

The system opens the SAPphone dialog box where you can start, end, and process the call further. The employee's data is transferred to the dialog window so that you do not have to look up the telephone number of the employee in the master data and key it in.

Calling an Employee from Master Data Maintenance

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the *Maintain HR Master Data* screen.

2. In the *Personnel number* field, enter the personnel number that you require.
3. Choose *Utilities* → *Call employee.*

   A dialog window appears with the employee's telephone numbers.

4. Select the desired telephone number.
5. Choose *Select.*

   The *Dial* function is only active if the correct settings have been made for the specific work centers.

   The system displays the SAPphone dialog box which shows the selected telephone number, country code, name, company, and any relevant notes.

   Check that the number in the field next to the telephone number is correctly formatted, ie, that the area code has been recognized and the numbers for an outside line have been added in the case of external calls. You cannot change this number on the SAPphone dialog box. If the number setup is incorrect, even though the telephone number and country indicator are correct, you must check the number changes in the cross-client settings.

6. Choose *Select.*

   The system dials the employee's telephone number. Directly next to *Dial and Close*, the *Hang up* function is displayed, which you can use to end the current call. You can also end the call by replacing the receiver. As with any other phone call, you can put the call through to another number, put it on hold, etc.

Result

You have made a phone call to an employee via the SAP System from HR master data maintenance.

For more information on the functions included in the SAPphone dialog box, please see the Calling an Employee From Master Data Maintenance [Page 187] section.

Processing Payroll Relevant HR Master Data

You can change existing infotypes and create new infotype records when processing HR master data. The system automatically creates a history of data changes and developments during the period that an employee works at an enterprise.

Sometimes, changes made to an employee's infotype records can trigger retroactive accounting [Ext.] .

A retroactive accounting operation is automatically triggered in the following cases:

- you make changes to infotype records or payroll-relevant individual fields pertaining to a period for which an employee has already been included in payroll,
- you change the Payroll Status [Page 81] infotype (0003). This infotype is normally updated by the system. You should only change the fields in this infotype in exceptional circumstances.

The following sections describe how the master data changes described above affect the employee's payroll, and what you must take note of when such changes are made.

Maintaining Master Data in the Payroll Past [Page 191]

Changing the Payroll Status [Page 195]

Maintaining Master Data in the Payroll Past

Use

Changes made to an employee's infotype records affect the employee's payroll to some extent. If you change data that affects the payroll for a period for which the payroll has already run, retroactive accounting must be performed for this employee and for the period concerned.

An employee's *Basic Pay* (infotype 0008) is increased from $ 3.500 to $ 3.700 on 01.04.98. However, the payroll has already run for this employee for the period up to May 31, 1998. If you change the basic pay record, the system performs retroactive accounting when the next payroll runs for this employee. This ensures that the increase in basic pay, effective as of 01.04.98, is taken into retroactive consideration.

Prerequisites

In *Personnel Administration* customizing you can set up the infotypes and how they are relevant in retroactive accounting for *Payroll* and *Time Management*.

The following possibilities are available:

- an infotype is generally relevant for retroactive accounting
- an infotype's fields are relevant for retroactive accounting
- an infotype is relevant for retroactive accounting on the wage type level

To find out more about retroactive accounting relevancy, see *Personnel Administration* → *Setting Up Procedures* → *Infotypes* → Define Fields Relevant for Retroactive Accounting [Ext.] in the implementation guide (IMG).

SAP delivers the infotypes with the appropriate settings for retroactive accounting. In the standard system, changes to the following infotype data records generally initiate retroactive accounting

- Basic Pay (0008) [Page 82]
- Recurring Payments/Deductions (0014) [Page 89]
- Additional Payments (0015) [Page 85]

Features

To indicate that a change has been made to an infotype record or field that affects the employee's payroll and that a retroactive accounting run must be run, the warning message *Entry for payroll past (retroactive accounting*) appears when you save your changes.

Retroactive Accounting Date

The retroactive accounting date is the date as of which retroactive accounting is performed for an employee.

If you trigger retroactive accounting when maintaining payroll-relevant data, the system will automatically determine the retroactive accounting date.

Maintaining Master Data in the Payroll Past

The way in which the retroactive accounting date is calculated depends on the following functions that are used in HR master data maintenance:

- If you add a new infotype record using the functions *Create* or *Copy,* the begin date of the infotype record that was added will be used as the retroactive accounting date.
- If you delete an existing record using the *Delete* function, the begin date of the deleted record will be used as the retroactive accounting date.
- If you maintain an existing record using the function *Change,* the following three distinctions are made with regards to creating the retroactive accounting date:
  - You change the data part of an infotype record that is relevant to retroactive accounting.

    This triggers a retroactive accounting run as of the validity begin date of the current infotype record.
  - You change the validity begin date.

    If the new start date is **earlier** than the original start date, then the new start date is used as the retroactive accounting date.

    If the new start date is **later** than the original start date, the original start date will be used as the retroactive accounting date.
  - You change the end date of the validity period.

    If the new end date is **later** than the original end date, the old end date + 1 day of the changed infotype record is used as the retroactive accounting date.

    If the new end date is **earlier** than the original end date, the new end date is used as the retroactive accounting date.

    There are two ways to change the end date. You can either use the *Change* function to change the end date, or proceed as described in Delimiting the End Date of a Payroll-Relevant Infotype Record [Page 193]. It is much easier to use the *Change* function.

    You cannot use the *Change* function to maintain the end dates of infotype records that have time constraint 1 (for example, infotype 0008 *Basic Pay*).

If you want to check the date as of which retroactive accounting is performed for an employee, display the *Payroll Status* infotype (0003) for this employee. If the period for which the changes were made is earlier than the date of the last payroll accounting run, then the entry in the field *Earliest MD change* (earliest master data change since last payroll) will be the date as of which retroactive accounting will be repeated for this employee.

For further information on payroll and retroactive accounting see the retroactive accounting documentation: *PY - Payroll Accounting* → Retroactive Accounting [Ext.]

Delimiting the End Date of Payroll-Relevant Infotype Records

Use

If you want to set the end date for a payroll-relevant infotype record when you are maintaining HR master data, the procedure is different to the procedure described for changing a data division or the record's start date.

As well as using the *Change* function to change the end date of an infotype record, you can also use the *Delete* function to set a time limit for the record.

Infotype records with time constraint 1 (such as infotype 0008 *Basic Pay*) cannot be deleted. If you still want to delimit an infotype record that has time constraint 1, you can create a new infotype record for the same infotype. This new infotype record merely serves to delimit the old one.

See also:

Maintaining Master Data in the Payroll Past [Page 191]

Procedure

1. From the SAP Easy Access screen, select Human Resources → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter the employee's personnel number and select the relevant infotype.
3. Select *Edit* → *Delete*.

   The system displays the currently valid infotype record for you to delete.

   If more than one record is valid at the same time, use the *Goto* → *Next record* function to find the correct record.

4. In the *From* field, enter the date as of which the valid infotype record should be deleted.
5. Select *Delete.*

   You return to the initial maintenance screen for HR master data.

Result

You have set the end date for a payroll relevant infotype record, so that a retroactive accounting run is triggered on the record's end date.

See also:

Delimiting the End Date of Payroll-Relevant Infotype Records: Example [Page 194]

Delimiting the End Date of Payroll-Relevant Infotype Records: Example

Prerequisites

As of November 1, 1997, your employee, Ms Miller, receives a special payment. This is stored in the *Recurring Payments and Deductions* infotype (0014). This payment is due to finish on 06.01.1998. However, the last payroll run for Ms Miller was performed on 07.31.1998. In this case, it is useful to repeat the employee's payroll for the period as of 06.01.1998. The retroactive accounting date is 01.06.98. To ensure this, you must delete the infotype records that are valid as of 06.01.1998.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

   This takes you to the initial maintenance screen for HR master data.

2. Enter Ms. Miller's personnel number and select the *Recurring Payments and Deductions* infotype (0014*).*

3. Select *Edit* → *Delete*.

   The system displays the currently valid infotype record for you to delete.

4. Under *Start date of validity period,* enter `06.01.98`.

   From this time point on, the special payment is set for Ms. Miller.

5. Select *Delete.*

   You return to the initial maintenance screen for HR master data.

Result

The end date of the current record in infotype *Recurring Payments/Deductions* (0014) is automatically delimited. A retroactive accounting operation is automatically triggered from the 06.01.1998.

Changing the Payroll Status

Use

The Payroll Status (0003) [Page 81]infotype contains data that controls an employee's payroll runs and time evaluations. This infotype is generally edited by the system only and is automatically created when an employee is hired. The system automatically updates infotype 0003 *Payroll Status* when the payroll is run, time is evaluated, or changes are made to the payroll past for the employee.

You should only change data stored in the *Payroll Status* (0003) infotype in special cases, as these changes affect the employee's payroll and/or retroactive accounting. If you want to make such changes, make sure you understand exactly how the payroll system (especially retroactive accounting) works. Read the corresponding section in the *PY - Payroll* documentation.

Features

Payroll and Retroactive Accounting

When processing master data, you will only have to make changes to the *Payroll Status* infotype (0003) in exceptional circumstances in order to enter specific payroll or time management data for individual employees. You can maintain the fields under the *Payroll/Retroactive Accounting* header for payroll.

A great deal of caution is needed when changing an employee's payroll status. The following examples, which describe how to process the *Payroll Status* infotype (0003), represent exceptional circumstances, that is, instances when it is a good idea to make such changes.

Earliest Personal Retroactive Accounting Date

The *Earl.pers.RA date* (*Earliest personal retroactive accounting date*) field enables you to determine the date up to which retroactive accounting is possible for the employee.

You can only change the employee's master data up to and including this earliest personal retroactive accounting date. If you try to change data in the payroll past for a date that occurs before the earliest personal retroactive accounting date, the system displays an error message.

Usually, you do not define the earliest personal retroactive accounting date for an individual employee in the *Payroll Status* infotype. Instead, you define the earliest personal retroactive accounting date for an entire Payroll Area [Ext.] using the *Payroll Control Record.* If the *earliest retroactive accounting period* in the payroll control record does not match the *earliest personal retroactive accounting date* in the *Payroll Status* infotype, the system uses the later date as the earliest retroactive accounting date.

Changing the Payroll Status

Your employee, Fred Miller, belongs to the payroll accounting area X2. The earliest retroactive accounting period in the payroll control record for this payroll area is 01 1998.

In the *Payroll Status* infotype (0003), you enter March 1, 1998 as the earliest personal retroactive accounting date for Mr Miller.

In this example, the system sets the employee's earliest personal retroactive accounting date as March 1, 1998. You can only make changes in Mr Miller's payroll past up to and including March 1, 1998.

Accounted to:

The *Run payroll up to* field enables you to determine the date up to which the payroll will run for an employee. You will need to make an entry in this field if you want to perform payroll for an employee who has left the company.

Usually, you continue running the payroll for an employee who has left the enterprise to ensure that he or she is still remunerated after the work relationship has ended. Please note the following:

- An employee's basic payments will not be paid (Basic Pay (0008) [Page 82]), even if you have entered a date in the *Accounted to* field in the *Payroll Status* infotype (0003) that is after the leaving date.
- If you still want to pay an employee after he or she has left the enterprise and the work relationship has ended, you must enter the payment data in the Recurring Payments and Deductions (0014) [Page 89] infotype or Additional Payments (0015) [Page 85] infotype.

Your employee, Fred Miller, leaves the enterprise on December 31, 1998. Therefore, you run the *Leaving* personnel action type for this employee for December 31, 1998. As a result, as of 01.01.1999, Mr Miller will no longer be included in payroll because as of this date he no longer belongs to the company.

However, there is a clause in Mr Miller's contract that states that he cannot take up another position until at least 6 months after the end of the work relationship. Although Mr. Miller has left the enterprise, he still receives monthly payments of $3,000 for this period. To make sure that Mr Miller is included in payroll despite the fact that he has left the company, you must maintain the date accordingly in the field *Accounted to* in the infotype *Payroll Status* (0003).

To ensure that this payment of $3000 is paid, you must enter this amount as a recurring payment in the *Recurring Payments and Deductions* infotype (0014).

In this example, you must enter `30.06.1999` in the *Run payroll up to* field in *Payroll Status* infotype (0003). Mr. Miller is then included in payroll up to and including, but not after this date.

In the *Recurring Payments and Deductions* infotype (0014), you must enter a wage type for Mr. Miller for $3,000. Enter `01.01.1999` until `30.06.1999` as the validity period.

See also:

Leaving The Enterprise [Page 142]

Do not process after

In the field *Do not process after,* you specify the final date after which payroll is no longer run for an employee.

As of 15.09.98, you do not want the payroll to run for your employee, Fred Miller. In this example, you must enter `14.09.98` in the *Do not account after* field.

This means that although Mr Miller has not left the company and can still receive continued pay, he will not be selected by the payroll driver as of September 15, 1998.

If you have used the field *Do not process after* to exclude the employee from payroll accounting, this employee will also not be selected if a HR master data change triggers retroactive accounting.

Accounted to

Payroll is usually started for a payroll period by entering a payroll area. Assuming that the payroll runs smoothly, all of the employees assigned to the specified payroll area are selected and included in the payroll run. In the payroll control record, the status is then set to *Exit payroll* for this payroll area. The current payroll period for this payroll group is then updated.

In addition to this, the date will be noted in the *Payroll Status* infotype (0003) in the field *Accounted to.* This date specifies the date up to which payroll accounting has been run for the employee. After each successful payroll run, this date is updated. This date corresponds to the last day of the payroll period for which the payroll has been run for the employee.

You must not change the *Accounted to* date in your live system. You can only change the *Accounted to* date in a **test system** for **test purposes.**

If you want to repeat a payroll run for an employee for a particular period in a **test system** and for **test purposes**, you can reset the *Accounted to* date. This enables you to run the employee's payroll again for the period in question, despite the fact that the payroll has already run successfully for this period according to the payroll control record.

Earliest Change to Master Data

If an employee's payroll relevant data has been changed, the system stores the earliest date from which the HR master data change is valid in the *Earliest MD change* field (earliest master data change).

A new payroll must be run to take into account the change to the HR master data. According to the payroll control record's status, a retroactive payroll will be triggered automatically or the current payroll will automatically be repeated.

Changing the Payroll Status

Personnel Number Locked

You can use the *Pers.no.locked* (personnel number locked) indicator to exclude an employee from payroll. It is a good idea to lock a personnel number for payroll, if the employee has been rejected by a payroll run due to an error in his/her master or time data.

Payroll Correction

The *Payroll Correction* indicator is set by the system if payroll relevant data has been changed in the correction phase or if an employee is not accounted for during a payroll run because of an error in their master data or time data. The personnel numbers of employees rejected by the payroll program are written to Payroll Correction Run Search Help [Page 165] based on the *Payroll correction* indicator. If you want to remove the rejected employee from *Payroll Correction Run* search help, you can deactivate the employee's *Payroll correction* indicator.

An error in Fred Miller's master and time data causes him to be rejected by the payroll program. Mr. Miller's personnel number is written to the *Payroll Correction Run* search help. As a result, you cannot set the payroll status to *Exit payroll,* because *Payroll Correction Run* search help is not empty. At this point, you would normally set the status to *Released for correction,* correct the master and time data, and run the payroll again. Instead of this, you want to end payroll first and correct the error in Mr Miller's HR master data at a later date.

To do this, you deselect the *Payroll correction* indicator and set the status of the payroll control record to *Exit payroll*. At a later date, you correct the error in Mr. Miller's HR master data and run the payroll for this period once again.

Time Evaluation and Retroactive Accounting

The system stores information within the framework of *Time Evaluation.* This information controls the employee's time evaluation.

Earliest Possible Retroactive Accounting Date in Time Evaluation

The *Earl.pers.RA date* (*Earliest personal retroactive accounting date in time evaluation*) field enables you to determine the date up to which retroactive accounting for time evaluation and pair formation is possible for the employee.

Retroactive Accounting Date for Time Evaluation

At the start of every time evaluation, the *Time Evaluation Report* (RPTIME00) determines the period that is to be evaluated for each employee.

In the standard system, the last date of the evaluation is the date on which the time evaluation was performed. Various factors determine the first date of the evaluation. For instance, you can specify the date in the report selection screen. However, two dates stored in the system are essential for determining the first evaluation date.

- The report RPTIME00 determines the first day that can be evaluated based on the retroactive accounting date from plant data collection (PDC) stored in the *PDC recalculation* field (PDC recalculation date) in the *Payroll Status* infotype (0003). As a rule, the date entered refers to the date of the employee's last error free time evaluation.

If the PDC recalculation date is determined on the basis of an error in time evaluation, the *PDC error indicator* is set.

- The system automatically resets the *PDC recalculation* date if changes are made for periods that have already been evaluated in infotypes that are relevant to recalculations.

- You can overwrite the PDC recalculation date. However, you should only use this function for test purposes. To ensure that there are no gaps in the evaluation of time data, you should not change this date.
  - Pair formation errors also trigger a recalculation. However, this recalculation date is not entered in the *Payroll Status* infotype (0003).

The system uses the earliest of the two recalculation dates. In certain circumstances, changes to the PDC recalculation date are ignored by the system.

Retroactive Accounting of the Personal Calendar

The *Personal calendar from* field contains the date as of which the employee's personal calendar is generated.

This date only affects national versions of the calendar that can be generated by special reports. This date does not affect recalculations of the personal calendar in the international version.

PDC Error Indicator

If the report RPTIME00 comes across an error for an employee, the system automatically sets the *PDC error indicator*.

The system also simultaneously writes the employee's personnel number to the PDC Error Indicator Search Help [Page 166]. You can use this search help to subsequently select and re-evaluate the personnel number that was not evaluated by the report RPTIME00.

The system automatically resets the *PDC error indicator* for all the personnel numbers that are successfully re-evaluated.

Changing the Payroll Status

Procedure

From the SAP Easy Access screen, select Human Resources → *Personnel Management* → *Administration* → *HR Master Data* → *Maintain*.

This takes you to the initial maintenance screen for HR master data.

Enter the personnel number of the employee whose payroll status you want to change.

There are two possible ways to change the payroll status:

a) Select *Utilities* → *Change payroll status*.

This takes you to the *Payroll Status* infotype (0003). You can change practically all of the infotype's fields.

The function used to change the payroll status is subject to special authorization controls. You need authorization to call up the function and authorization to maintain the infotype.

b) Select the *Payroll Status* infotype (0003) and then *Edit* → *Change*.

Owing to authorization controls you can only change a few fields in the infotype.

Result

You have changed the payroll status of an employee.

Displaying HR Master Data

You display an infotype on the screen using the display function. In display mode you are unable to process or update data.

The *List* function is used to display an overview of all records stored for a specified infotype.

See also:

Displaying a Current Infotype Record [Page 202]

Displaying a Previous Record [Page 203]

Displaying a Complete List of Infotype Records [Page 204]

Displaying a List of Infotype Records for a Specific Validity Period [Page 205]

Displaying an Individual Infotype Record from a List [Page 206]

Displaying Individual Infotype Records in Succession [Page 207]

Displaying a Current Infotype Record

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

   This takes you to the initial display screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose record you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype record you want to display, and if it does not appear in the infotype selection list, read the Selecting HR Data [Page 162] section.

4. If necessary, enter the number of a subtype.
5. Select *Edit* → *Display*.

   The current infotype record is displayed.

Result

You have displayed the current infotype record.

Displaying a Previous Record

Procedure

16. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

    This takes you to the initial display screen for HR master data.

17. Enter the employee's personnel number.

18. Select either the infotype you want from the infotype selection list. or directly enter the name/number of the infotype whose record you want to display in the field *Infotype*.

    If you do not know the exact name or number of the infotype record you want to display, and if it does not appear in the infotype selection list, read the Selecting HR Data [Page 162] section.

19. Select *Goto* → *Maintain overview*.

    A list of all available data records for the infotype is displayed.

20. Select the previous record that you want to display.

21. Select *Edit* → *Select*.

    The infotype record is displayed.

Result

You have displayed the previous record.

Displaying a Complete List of Infotype Records

Prerequisites

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

   This takes you to the initial display screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose available records you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype records you want to display, and if it does not appear in the infotype selection list, please read the Selecting HR Data [Page 162] section.

   If you also want to display a list of all available subtype records, enter the number of the relevant subtype.

4. Select *Goto* → *Maintain overview*.

Result

You have displayed a list of all the available data records for an infotype.

See also:

Displaying an Individual Infotype Record from a List [Page 206]

Displaying a List of Infotype Records for a Specific Validity Period

Prerequisites

On either the display or maintenance HR master data screen, you can restrict the data records offered for display or maintenance (not creation) by the system. You do this by entering a relevant value in the *Period* field. If you are creating a data record, the value in the relevant field is carried over to the next screen.

You control whether the period in the *Maintain Overview* function is carried over in Customizing for *Personnel Administration*. Choose *Personnel Administration* → *Setting Up Procedures* → *Infotypes* → Set Up Infotypes [Ext.]

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

   This takes you to the initial display screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose records you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype records you want to display, and if it does not appear in the infotype selection list, please read the Selecting HR Data [Page 162] section.

   If you also want to display a list of all available subtype records valid for a certain period, enter the number of the relevant subtype.

4. In the *Period* field, enter the validity period for the infotype records.
5. Select *Goto* → *Maintain overview*.

Result

The system displays a list of all the infotype records valid within the specified period.

See also:

Displaying an Individual Infotype Record from a List [Page 206]

Displaying an Individual Infotype Record From a List

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

   This takes you to the initial display screen for HR master data.

2. Enter the employee's personnel number.
3. Select either the infotype you want from the infotype selection list, or directly enter the name/number of the infotype whose record you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype record you want to display, and if it does not appear in the infotype selection list, read the Selecting Human Resource Data [Page 162] section.

4. Select *Goto* → *Maintain overview*.

   A list of all data records for the infotype is displayed.

5. In this list, select the infotype record that you want to display.
6. Select *Edit* → *Select*.

Result

You have selected and displayed an infotype record from a list of infotype records.

Displaying Individual Infotype Records in Succession

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Display*.

   This takes you to the initial display screen for HR master data.

2. Enter the employee's personnel number.

3. Select either the infotype you want from the infotype selection list or directly enter the name/number of the infotype whose records you want to display in the field *Infotype*.

   If you do not know the exact name or number of the infotype records you want to display, and if it does not appear in the infotype selection list, please read the Selecting Human Resource Data [Page 162] section.

4. Select *Goto* → *Maintain overview*.

   A list of all data records for the infotype is displayed.

5. You can select all of the infotypes in the list by using the *Edit* → *Select/Deselect all*.

6. Select *Edit* → *Select*.

   The current infotype record is displayed.

7. Select *Goto* → *Next record*.

   The next infotype record is displayed.

   Repeat the last step until the last infotype record is displayed and until the system displays a corresponding message.

Result

You have sequentially displayed a list of all the selected infotypes.

Fast Entry of HR Master Data

Use

The fast entry of master data function enables you to simultaneously create and edit the same infotype or subtype record for more than one employee.

You do not have to individually enter the infotype record for each employee. You can enter data for many employees simultaneously on one screen containing just the required entry fields for respective infotype.

You can select personnel numbers in the following ways:

- Manually list the personnel numbers on the fast data entry screen before the data entry.
- Directly enter personnel numbers on the fast entry screen.
- List the personnel numbers using a report based on specific search criteria

See also:

Selecting Personnel Numbers for Fast Entry of HR Master Data [Page 209]

Processing HR Master Data Using Fast Entry [Page 216]

Selecting Personnel Numbers for Fast Entry of Master Data

When using the fast entry feature to maintain an infotype for multiple employees, you access these employees by their personnel numbers. You can create the list of personnel numbers in one of three ways:

- **Manually Without Using the Fast Entry Screen**

  Manual pre-selection of the employees you wish to maintain an infotype record for occurs in an empty data entry screen where you can enter the relevant personnel numbers. You can use matchcodes to search for unknown personnel numbers according to specific criteria.

- **Directly Using the Fast Entry Screen**

  Rather than compiling lists of personnel numbers which are then transferred to the fast entry screen, you can enter them directly in the appropriate infotype's fast entry screen.

- **Via Report Selection**

  You can use a selection report to generate a list of employees. This option is advantageous when the group of employees you are looking for belong to the same personnel subarea, employee group or subgroup for example.

Please see:

Manually Preselecting Personnel Numbers for Fast Entry of Master Data [Page 210]

Entering Personnel Numbers Directly for Fast Entry of Master Data [Page 212]

Using Reports to Create Lists of Personnel Numbers for Fast Entry of Master Data [Page 214]

Manually Preselecting Personnel Numbers for Fast Entry of HR Master Data

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter personnel numbers* group frame, choose *Manual preselection*.

3. Choose either the infotype you want from the infotype selection list or enter the name/number of the desired infotype directly in the field *Infotype*.

   The following infotypes are contained in the infotype selection list:

   Recurring Payments/Deductions **(0014)**

   Notifications **(0128)**

   Additional Payments **(0015)**

   Using *Personnel Administration* customizing, you can transfer other infotypes to the infotype selection list - as long as they have been prepared for HR master data fast entry; see *Personnel Administration* → *Setting Up Procedures* → *Infotype Menus* → Change Infotype Menu [Ext.].

   To learn how to prepare an infotype for HR master data fast entry, see the *HR - Tools* documentation in the Enhancing an Infotype for Fast Entry [Ext.].

4. Choose *Edit* → *Create*.

   You see an empty list in which you can enter the required personnel numbers.

5. Enter the personnel numbers.

   You can use search help to search for unknown personnel numbers.

   For further information, see Using Search Help for Personnel Numbers [Page 163].

6. Choose one of the following processing possibilities:

   Edit → Create

   Edit → Create using proposal

   Edit → Change

   Edit → Delete

   Edit → Lock/Unlock

   The specified personnel numbers are ready for processing.

Result

You have manually entered a number of personnel numbers for HR master data fast entry.

You can process these personnel numbers using HR master data fast entry. For further information see the Processing HR Master Data Using Fast Entry [Page 216] section.

Entering Personnel Numbers Directly for Fast Entry of HR Master Data

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter personnel numbers* group frame, choose *Enter in fast entry screen*.

3. Choose either the infotype you want from the infotype selection list or enter the name/number of the desired infotype directly in the field *Infotype*.

   The following infotypes are contained in the infotype selection list:

   Recurring Payments/Deductions **(0014)**

   Notifications **(0128)**

   Additional Payments **(0015)**

   Using *Personnel Administration* customizing, you can transfer other infotypes to the infotype selection list - as long as they have been prepared for HR master data fast entry; see *Personnel Administration* → *Setting Up Procedures* → *Infotype Menus* → Change Infotype Menu [Ext.].

   To learn how to prepare an infotype for HR master data fast entry, see the *HR - Tools* documentation in the Enhancing an Infotype for Fast Entry [Ext.].

4. Choose one of the following processing possibilities:

   Edit → Create

   Edit → Create using proposal

   Edit → Change

   Edit → Delete

   Edit → Lock/Unlock

   The fast data entry screen appears for the selected infotype.

5. Enter the personnel numbers.

   You can use search help to search for unknown personnel numbers.

   For further information, see Using Search Help for Personnel Numbers [Page 163].

   The specified personnel numbers are ready for processing.

Result

You have entered a number of personnel numbers directly for HR master data fast entry.

Entering Personnel Numbers Directly for Fast Entry of HR Master Data

You can process these personnel numbers using HR master data fast entry. For further information see the Processing HR Master Data Using Fast Entry [Page 216] section.

Using a Report to Create Lists of Personnel Numbers for Fast Entry of Master Data

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The system displays the *Fast Entry* screen.

2. Enter an infotype by choosing it from the default menu or by entering the infotype number in the *Infotype* field.

   The default menu in the standard system currently includes the following infotypes, among others:

   Recurring Payments/Deductions **(0014)**

   Additional Payments **(0015)**

   You can also configure other infotypes to be included in the fast entry default menu. Please contact your system administrator for more information.

3. In the *Enter personnel numbers* group, select *Preselect using report*. You can enter the name of a specific report in the field provided.

4. Choose the *Enter* function.

   This takes you to the *Personnel Number Selection for Fast Entry* screen (report RPLFST00 for the infotypes listed above, and report RPLBLAD0 for infotype 0215 *Construction Pay: Transaction Data*). This screen enables you to enter selection parameters for a specific report, and other search criteria.

5. Make the required entries and choose *Program* → *Execute*.

   A list is displayed of all personnel numbers that meet your search criteria.

6. Edit the list, if necessary by choosing *Edit* → *Insert personnel number* or *Edit* → *Delete personnel number*.

7. Select one of the available processing functions listed under the *Edit* menu option.

Result: The personnel numbers that you selected with the report are displayed on the fast entry screen, which enables you to maintain them.

Example: Using a Report to Create a List of Personnel Numbers for Fast Entry [Page 215]

Using a Report to Create a List of Employees for Fast Entry: Example

Prerequisites

A group of employees from personnel area 2020 have not received their vacation allowances. The Human Resources administrator (with personnel administrator code ABC) who maintains these employees' records is on vacation. As a result, you must correct the error yourself. However, you do not know which employees are affected. All you know is that they are active salaried employees assigned to cost center 5505 who started working at the enterprise on 01.02.98.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The system displays the *Fast Entry* screen.

2. Select either infotype *Additional Payments* (0015) from the default menu or enter the name/number of the infotype directly in the *Infotype* field.
3. In the *Enter personnel numbers* group, select *Preselect using report*.
4. Select *Edit* → *Change*.

   You are now in the *Personnel Number Selection for Fast Data Entry* (report RPLFST00) screen.

5. Enter the appropriate selection criteria based on the information in the example above.
6. Choose Program → Execute.

Result

A list of all employees that meet your search criteria is generated. After you have edited the list (if necessary), choose *Edit* → *Maintain* to ensure that the employees receive their vacation allowances.

Processing HR Master Data Using Fast Entry

Entering large amounts of information for a number of employees can be a lengthy process. If the information to be entered is similar for each employee, then it is possible to reduce repetitive actions by using the fast entry function.

You can use any of the following fast entry functions to update employee data in a specified infotype:

- **Create**
  This function enables you to create infotype data for more than one employee at the same time.
- **Create using default**
  This function allows you to create infotype data for numerous employees using default values. These default values are transferred to the fast entry screen and can be modified as necessary.
- **Maintain**
  This function allows you to change infotype data that already exists in the system.
- **Delete**
  This function enables you to delete existing infotype data for more than one employee.
- **Lock/Unlock**
  This function allows you to change the status of records from unlocked to locked by activating the *Lock indicator* for each record. (You may not change or add records in this processing mode.)

  You can process up to twenty personnel numbers at one time. If more are selected, the personnel numbers will be arranged in groups of twenty, with those remaining accessible via the *Further pers. numbers* function. You correct the subsequent lists of personnel numbers each time you save records for the preceding ones. When you save records for employees currently on display, the lists that follow the list currently on display are maintained automatically.

Please see:

Creating Master Data Records Using Fast Entry [Page 218]

Creating Master Data Records Using Fast Entry With Defaults [Page 221]

Maintaining Master Data Records Using Fast Entry [Page 224]

Deleting Master Data Records Using Fast Entry [Page 226]

Locking/Unlocking Master Data Records Using Fast Entry [Page 229]

Creating a Batch Input Session to Process Data Using Fast Entry [Page 232]

Creating Master Data Records Using Fast Entry

When using fast entry to maintain HR master data, you can create an infotype record for multiple employees within a single screen.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter Personnel Numbers* section, choose *Enter in fast entry screen*.

3. Choose either the infotype you want from the infotype selection list or enter the name/number of the infotype directly in the field *Infotype*.

   The default menu in the standard system currently includes the following infotypes:

   Recurring Payments/Deductions (Infotype 0014)

   Notifications (Infotype 0128)

   Additional Payments (Infotype 0015)

   You can configure other infotypes to appear in the default menu for fast entry. Please contact your system administrator for more information.

4. Choose *Create*.

   The system displays the fast entry screen for the selected infotype. All of the fields on this screen can be maintained.

5. Enter the personnel numbers of the employees for whom you want to create an infotype record. You can enter the personnel numbers directly or by Using the Search Help for Personnel Numbers [Page 163] function.

6. Maintain the required fields for each employee.

7. Save your entries.

You have created new infotype records for the employees you specified.

You can process up to twenty personnel numbers at one time. If you enter more than twenty personnel numbers, the system assigns the personnel numbers into groups of twenty. You can maintain groups that are not displayed on the screen by choosing *Other personnel numbers*.

See also:

Simultaneously Creating Master Data Records for Multiple Employees Using Fast Entry: Example [Page 220]

Simultaneously Creating Master Data Records for Multiple Employees Using Fast Entry: Example

Prerequisites

Five employees at your enterprise have been transferred to a different plant in a neighboring state. As a result, they will each receive a relocation expense amount of $2,000 to cover moving costs. This bonus must be recorded in each employee's *Additional Payments* infotype (0015). For this example you will enter the personnel numbers directly into the infotype's fast entry screen.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter Personnel Numbers* section, choose *Enter in fast entry screen*.
3. Choose either infotype *Additional Payments* (0015) from the default menu or enter the name/number of the infotype directly in the *Infotype* field.
4. Choose *Create*.

   The system displays the fast entry screen for the *Additional Payments* infotype (0015). All of the fields on this screen can be maintained.

5. Enter the personnel numbers of the five employees either directly, or by Using Search Help for Personnel Numbers [Page 163].
6. Enter the appropriate relocation expense wage type, and the amount of the allowance ($1,000), for each employee.
7. Save your entries.

The new *Additional Payments* infotype records for all five employees have been created.

Creating Master Data Records Using Fast Entry Defaults

When maintaining infotype records for multiple employees, you can use default values to create records for several employees simultaneously. Defaults prevent you from repeatedly having to enter the same data. Instead, you enter the data just once. It is then transferred automatically to the fast entry records of each employee. Default values can be changed if necessary.

To create master data infotype records for numerous employees simultaneously using fast entry default values, proceed as follows:

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter personnel numbers* group, choose a data entry method.

   If you do not know the personnel numbers of the employees for whom you want to create data records, please see Selecting Personnel Numbers for Fast Entry of Master Data [Page 209].

3. Enter an infotype by choosing it from the default menu or by entering the infotype number in the *Infotype* field.

   The default menu in the standard system currently includes the following infotypes, among others:

   Recurring Payments/Deductions (Infotype 0014)

   Additional Payments (Infotype 0015)

   You can also configure other infotypes to be included in the fast entry default menu. Please contact your system administrator for more information.

4. Choose the *Create using default* function.

   You see a screen containing fields for the default values that are available for the selected infotype.

5. Enter the required default values.

6. Choose *Next screen*.

   The system displays the fast entry screen for the selected infotype. Note that the system creates twenty entries consisting of the default data entered in the prior step.

7. Enter the personnel numbers of the employees for whom you want to maintain an infotype record. You can enter the personnel numbers directly or by Using the Search Help for Personnel Numbers [Page 163] function.

8. Make any modifications necessary and save your entries.

Result: The infotype records are created for the employees you specified.

You can process up to twenty personnel numbers at one time. If you select more, the system assigns the personnel numbers into groups of twenty. You can maintain

personnel number groups that are not displayed on the screen by choosing *Other personnel numbers*.

Example: Simultaneously Creating Master Data Records for Multiple Employees Using Fast Entry With Default Values [Page 223]

Simultaneously Creating Master Data Records for Multiple Employees Using Fast Entry With Default Values: Example

Prerequisites

In your company, ten employees in the sales department receive an additional trip cost allowance of $150. You want to avoid having to enter the same data ten times. Instead, you want to create records in the *Additional Payments* (0015) infotype for all these employees using default values.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter Personnel Numbers* section, choose *Enter in fast entry screen*.
3. Choose either infotype *Additional Payments* (0015) from the default menu or enter the name/number of the infotype directly in the *Infotype* field.
4. Choose the *Create using default* function.

   You see a screen containing fields for the default values that are available for the selected infotype.

5. Make the appropriate entries in the *Date of origin*, *Wage type*, and *Amount* fields.
6. Choose *Next screen*.

   The system displays the *Fast Entry* screen for the selected infotype. Note that the system creates twenty entries consisting of the default data entered in the prior step.

7. Enter the personnel numbers of the ten employees either directly, or by Using Search Help for Personnel Numbers [Page 163].
8. Save your entries.

The travel expense allowances for all ten employees are created.

Maintaining Master Data Using Fast Entry

The fast entry screen includes a variety of functions. You can simultaneously maintain master data records for multiple personnel numbers for a selected validity period. You can copy, change, delete, or lock/unlock the displayed records, as well as create new records. Moreover, you can check the accuracy of master data records that have already been created.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter Personnel Numbers* section, choose *Enter in fast entry screen*.

3. Choose the infotype you want from the default menu or enter the name/number of the infotype directly in the *Infotype* field.

   The default menu in the standard system currently includes the following infotypes:

   Recurring Payments/Deductions (Infotype 0014)

   Notifications (Infotype 0128)

   Additional Payments (Infotype 0015)

   You can configure other infotypes to appear in the default menu for fast entry. Please contact your system administrator for more information.

4. Use the *From* and *To* fields to specify the validity period.

5. Choose *Edit* → *Change*.

6.

   The system displays the fast entry screen for the selected infotype.

7. Enter the employees' personnel numbers either directly or by Using Search Help for Personnel Numbers [Page 163].

8. To display the fast entry records of the specified personnel numbers, choose *Enter*.

   If necessary, you can also make changes here.

   The infotype records for the relevant employee(s) which fall within the selection period are now available for maintenance.

   You can process up to twenty personnel numbers at one time. If you select more, the system assigns the personnel numbers into groups of twenty. You can maintain personnel number groups that are not displayed on the screen by choosing *Other personnel numbers*.

Deleting Master Data Using Fast Entry

When using fast entry to maintain HR master data, you can delete an infotype record for multiple employees simultaneously within a single screen.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. Choose *Enter in fast entry screen* in the *Enter Personnel Numbers* section.

3. Choose the infotype you want from the default menu or enter the name/number of the infotype directly in the *Infotype* field.

   The default menu in the standard system currently includes the following infotypes:

   Recurring Payments/Deductions (Infotype 0014)

   Notifications (Infotype 0128)

   Additional Payments (Infotype 0015)

   You can configure other infotypes to appear in the default menu for fast entry. Please contact your system administrator for more information.

4. In the *STy* field, enter the appropriate subtype.

5. Enter a validity period.

6. Choose *Edit* → *Delete*.

   The system displays the fast entry screen for the selected infotype.

7. Enter the personnel numbers of the employees for whom you want to delete an infotype record. You can enter the personnel numbers directly or by Using the Search Help for Personnel Numbers [Page 163] function.

8. Choose *Enter*.

   The system displays the fast entry records for the employees.

9. Enter deletion indicator ‘d’ in operation indicator column *O* for each infotype record you want to delete, or use the *Select* function to select all of the records for deletion.

10. Choose *Delete.*

    The selected records disappear from the screen. A system message is displayed which details the number of deleted records.

The selected infotype records have been deleted.

You can process up to twenty personnel numbers at one time. If you enter more than twenty personnel numbers, the system assigns the personnel numbers into groups of

twenty. You can maintain groups that are not displayed on the screen by choosing *Other personnel numbers*.

Example: Simultaneously Deleting Master Data Records for Multiple Employees Using Fast Entry [Page 228]

Simultaneously Deleting Master Data Records for Multiple Employees Using Fast Entry: Example

Prerequisites

Suppose five employees have been taken off of a work assignment involving hazardous conditions. As a result, they will no longer receive additional payments for hazardous duty. For this example you will enter the personnel numbers directly into the infotype's fast entry screen.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. Choose *Enter in fast entry screen* in the *Enter Personnel Numbers* section.
3. Choose either infotype *Additional Payments* (0015) from the default menu or enter the name/number of the infotype directly in the *Infotype* field.
4. Enter the wage type code for *Hazardous duty pay* in the *Subtype* field.
5. Choose *Edit* → *Delete*.

   This takes you to the fast entry screen for the *Additional Payments* infotype.

6. Enter the personnel numbers of the five employees either directly, or by Using Search Help for Personnel Numbers [Page 163].
7. Choose *Enter*.

   The system displays the fast entry records for these employees' hazard bonuses.

8. Choose the *Select* function.

   The five infotype records are highlighted.

9. Choose *Delete.*

The *Additional Payments* infotype records for all five employees have been deleted.

Locking/Unlocking Master Data Records Using Fast Entry

When you maintain HR master data using fast entry, you can simultaneously lock or unlock an infotype for multiple employees. Infotype records are locked if they should, for example, not be included in a certain payroll period. You may not add or change the infotype record for any employee while using this function.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter Personnel Numbers* section, choose *Manual preselection*.

3. Choose the infotype you want from the default menu or enter the name/number of the infotype directly in the *Infotype* field.

   The default menu in the standard system currently includes the following infotypes:

   Recurring Payments/Deductions (Infotype 0014)

   Notifications (Infotype 0128)

   Additional Payments (Infotype 0015)

   You can configure other infotypes to appear in the default menu for fast entry. Please contact your system administrator for more information.

   If you want to unlock locked infotype records, select the *Locked records only* field in the *Maintain/lock/unlock/delete* group. The system scans your entries and only selects the personnel numbers that are locked.

4. Use the *From* and *To* fields to specify the validity period.

5. Choose *Create*.

   You see an empty data table where you enter the relevant personnel numbers.

6. Enter the personnel numbers of the employees for whom you want to lock or unlock an infotype record.

   You can either enter the numbers directly or by Using Search Help for Personnel Numbers [Page 163].

7. Choose Edit → *Lock/unlock*.

   The system displays a list of names and personnel numbers for the employees you selected and their infotype records valid in the period you specified.

8. Activate the lock indicator for the records you want to lock, and deactivate the lock indicator for the records you want to unlock.

9. Save your entries.

The infotype records for the selected employees have been locked/unlocked.

Locking/Unlocking Master Data Records Using Fast Entry

You can process up to twenty personnel numbers at one time. If you enter more than twenty personnel numbers, the system assigns the personnel numbers into groups of twenty. You can maintain groups that are not displayed on the screen by choosing *Other personnel numbers*.

Simultaneously Locking/Unlocking Master Data Records for Multiples Employees Using Fast Entry: Example [Page 231]

Simultaneously Locking/Unlocking Master Data Records for Multiple Employees Using Fast Entry: Example

Prerequisites

Five employees in the sales department receive trip cost payments each month because their jobs entail extensive traveling schedules. However, they spent the month of July, 1998, attending various product and sales seminars, and as a result they will not receive their mileage allowance for this pay period. In this example, you use manual preselection to enter the personnel numbers. Assume that all of the records are unlocked.

Procedure

1. From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The *Fast Entry* screen appears.

2. In the *Enter Personnel Numbers* section, choose *Manual preselection*.
3. Choose either infotype *Additional Payments* (0015) from the default menu or enter the name/number of the infotype directly in the *Infotype* field.
4. In the *STy* field, enter the wage type code for trip cost payments.
5. Enter a validity period.
6. Choose *Enter*.

   You see an empty data table where you enter the relevant personnel numbers.

7. Enter the personnel numbers of the five employees either directly, or by Using Search Help for Personnel Numbers [Page 163].
8. Choose Edit → *Lock/unlock*.

   You see the five employee names and numbers along with the *Mileage allowance* information for each which correspond to the entered validity period.

9. Choose *Lock/unlock*.

   The lock indicators of all five employee records are activated.

10. Save your entries.

The *Mileage allowance* subtype records for all five employees are locked.

Creating a Batch Input Session to Process Data Using Fast Entry

Creating records for a large number of employees can be a time-consuming process. Ideally, you should use a batch input session that can run at night or when system load is low. This means you can process your data without burdening the system during peak or normal system load periods.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry*.

   The system displays the *Fast Entry* screen.

2. In the *Save option* group, choose *Create batch input session*.
3. In the *Enter personnel numbers* group, choose a data entry method.

   If you require further information, please see Selecting Personnel Numbers for Fast Entry of Master Data [Page 209].

4. Enter an infotype by choosing it from the default menu or by entering the infotype number in the *Infotype* field.

   The default menu in the standard system currently includes the following infotypes, among others:

   Recurring Payments/Deductions (Infotype 0014)

   Additional Payments (Infotype 0015)

   You can also configure other infotypes to be included in the fast entry default menu. Please contact your system administrator for more information.

5. In the *Edit* menu, choose the method of processing that you require.
6. Maintain the data for the selected employees.
7. Save your entries.

Result: After you have saved the fast entry data, you return automatically to the initial selection screen in which the name of the new batch input session is displayed as a system message.

The data is now stored in a batch input session. To import the data into the system, you must start the batch input session. For information on how to start a batch input session, or how you schedule a background program which will automatically start the batch input session, select the following menu path: *Help* → *SAP Library* → *Basis Components* → *System Administration* → *System Services*.

Time Constraints in HR Master Data

When you update an infotype, old data is not lost but archived for historical evaluation. The system records a specific period of validity for each infotype, This enables the system to store more than one infotype record at the same time, even if their validity periods overlap. This means that the time relationships between infotype records must be defined. The concept of time constraints enables you to do this.

HR master data uses the following three time constraints:

- **Time Constraint 1**

  For the entire time that the employee works at the enterprise, exactly one valid infotype record must exist. The validity periods of the individual records must not overlap. If a new record is created, the system automatically uses the start date of the new record as the delimitation date of the old record. Gaps are only allowed between the employee's entry date and the start date of the first record.

  Time constraint 1 must be used for all of the infotypes containing information that must be available at all times. This is particularly true of personal and organizational assignment data.

  If a record is delimited because of time constraint 1, the system displays an appropriate message.

- **Time Constraint 2**

  No more than one valid record can exist at any one time. Records with constraint 2 must not overlap. Their existence is not obligatory. If a new record is created, the system automatically delimits the previous record, if one exists.

  If a record is delimited because of time constraint 2, the system displays an appropriate message.

- **Time Constraint 3**

  Any number of valid records can exist at any one time. The individual records do not conflict with each other.

The system also contains the following time constraint indicators:

- **Time Constraint A**

  Infotypes with time constraint A must have no more than one record. The system automatically assigns the record a validity period from January 01, 1800 through December 31, 9999. This validity period cannot be subdivided.

  Infotype records with time constraint A cannot be deleted.

- **Time Constraint B**

  Infotypes with time constraint B must have no more than one record. The system automatically assigns the record a validity period from January 01, 1800 through December 31, 9999. This validity period cannot be subdivided.

  Infotype records with time constraint B can be deleted.

- **Time Constraint T**

  Infotype records with time constraint T depend on the subtype.

The principles of data entry and time constraints that apply to infotypes ensure that data is consistent and accurate. They also constitute the basis of time recording, payroll accounting, and reporting.

Connection to the Resumix® Recruitment System

If you use the SAP *Personnel Administration* application component together with the Resumix® recruitment system, SAP provides you with an interface that enables you to transfer data between the two systems.

The following procedures apply to Resumix® 4.x. If you use Resumix® 5.0, you must proceed in accordance with the instructions in the Connection to Partner Recruitment Systems [Page 239] section.

There are two ways of transferring such data:

- Data export from the SAP System to Resumix®

  You can export vacant positions from the SAP System to the Resumix® database.

- Data import from Resumix® to the SAP System

  You can import applicant data entered in Resumix® to the SAP *Personnel Administration* application component.

The interface is necessary if you want to hire applicants whose data was entered in Resumix®, or if you want to use vacant positions that were created in the SAP System in Resumix®.

Prerequisites

Data transfer between the two systems is only possible if the interface has been set up. You can set the interface up using Customizing. For further information, call up the Implementation Guide for *Personnel Administration* and choose *Interfaces and Integration* → *Integration with Resumix.*

Importing Applicant Data from Resumix® to the SAP System

Prerequisites

You can transfer applicant data entered in Resumix® to SAP *Personnel Administration*. All of the applicant data entered in Resumix® for which a corresponding field exists in SAP *Personnel Administration* is transferred to the SAP database. This includes the personal data and organizational assignment of the applicant.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry: Actions*.

   This takes you to the *Fast Entry for Actions* screen.

3. Select the *Import from Resumix* action type and choose *Select*.

   If you require further information on how to create export files in Resumix®, refer to the Resumix® documentation.

   This takes you to the *HR - Resumix: Import Applicant Data (Hiring)* screen. You can only ever import one applicant at a time.

4. In the list, select the applicant whose data you want to import.

   If an applicant's name appears more than once in the list, it means that the applicant has been exported from Resumix® on more than one occasion. However, the applicant is only imported once into the SAP System.

5. Choose *Import data*.

   A warning list of non-transferable field values could be displayed at this point. This data cannot be transferred because the SAP check tables do not contain the corresponding entries.

   This takes you to the *Create Actions* screen (infotype 0000) for hiring an applicant.

6. Add to or change the default values.

7. Save your entries.

   This takes you to the entry screen of the next infotype within the fast entry for actions function.

8. Enter the required data in this and all other infotypes.

   After you save your entries in the last infotype, a dialog box appears requiring you to confirm the import.

9. To transfer the data, choose *Confirm.*

The selected applicant is transferred to the SAP System.

Result

You have imported an applicant's data from Resumix® into SAP *Personnel Administration*.

Connection to Partner Recruitment Systems

Use

If you use the *Personnel Administration* application component together with a partner recruitment system, SAP provides you with an interface that enables you to transfer data between the two systems.

There are two ways of transferring such data:

- Data export from the SAP R/3 System to the partner system

  You can export vacant positions from the SAP R/3 System to the database of the partner system. This enables you to transfer additional data, such as the organizational unit of the position, or the manager responsible.

- Data import from the partner system to the SAP R/3 System

  You can import applicant data entered in the partner system into the SAP *Personnel Administration* application component. This enables you to transfer various types of information, such as personal data, address data, school certificate data, etc.

The interface is necessary if your enterprise wants to hire applicants whose data has been entered in a partner system, or if you want to use vacant positions created in the SAP R/3 System within the partner system.

Prerequisites

Data transfer between the two systems is only possible if the interface has been set up. You can set up the interface using Customizing. For further information, call up the Implementation Guide for *Personnel Administration* and choose *Interfaces and Integration* → *Integration with Recruitment in Partner Systems.*

Importing Applicant Data into the SAP System

Prerequisites

You can transfer applicant data entered in a partner system to SAP *Personnel Administration*. All of the applicant data that is entered in a partner system and for which a corresponding field in SAP *Personnel Administration* exists, is transferred to the SAP database. This includes the personal data and organizational assignment of the applicant.

Procedure

1. From the SAP Easy Access screen, select *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Fast Entry: Actions*.

   This takes you to the *Fast Entry for Actions* screen.

2. Select the *Import <from partner system>* action type and choose *Choose*.

   If you require information on how to create export files in the partner system in question, see the appropriate documentation.

   This takes you to the *Hire Transferred Employees* screen.

3. Select the applicant you want to hire from the list, and choose *Hire*.

   You can only hire one applicant at a time.

   This takes you to the *Create Actions* screen (infotype 0000) for hiring an applicant.

4. Add to or change the default values.

5. Save your entries.

   This takes you to the entry screen of the next infotype within the fast entry for actions function.

6. Enter the required data in this and all other infotypes.

   After you save your entries in the last infotype, a dialog box appears requiring you to confirm the import.

7. To transfer the data, choose *Confirm.*

   The selected applicant is transferred to the SAP System.

Result

You have transferred an applicant's data from the partner system to SAP *Personnel Administration*.

Calculation of Employment Period

Use

The employment period calculation functions [Ext.] enable you to determine different employment periods from the employee data. The result of the employment period calculation is usually required for further processes or functions. For example, the following processes require calculation of the employment period:

- After a specific period of employment, the SAP System should automatically perform a pay scale reclassification.
- The SAP System should determine the entitlement from the company pension scheme. This is based on the contributions paid and the employment period.
- The SAP System determines the pension entitlement in the Public Sector. One of the criteria used to determine the entitlement is the period of employment.
- The length of the probationary period is based on the period of employment. Certain absences, for example, illness, extend the probationary period. The SAP System determines the end of the probationary period.
- The SAP System valuates particular wage types based on the period of employment.
- The SAP System increases the leave entitlement according to the period of employment.
- After a given period of employment, the SAP System automatically generates an anniversary bonus.

Prerequisites

To enable the SAP System to calculate the employment period, a calculation process [Page 248] must exist with the necessary process steps and valuation models. The valuation model must contain selection classes and selection rules for the selection of employee data.

To make the necessary settings, see Customizing for *Personnel Administration* under *Evaluation Bases → Employment Period Calculation.*

The calculation processes and process steps for calculating the employment period are predefined by SAP. You can override these calculation processes. You can also define your own valuation models, selection classes, and selection rules and assign these to the required calculation process or process steps.

Scope of Functions

A complete calculation process consists of individual steps in the calculation of the employment period:

- Selection of periods from different infotypes using selection rules
- Grouping of the selected periods in selection classes
- Evaluation of grouped periods in the valuation model
- Assessment of periods according to given upper and lower thresholds
- Weighting of periods with a weighting factor

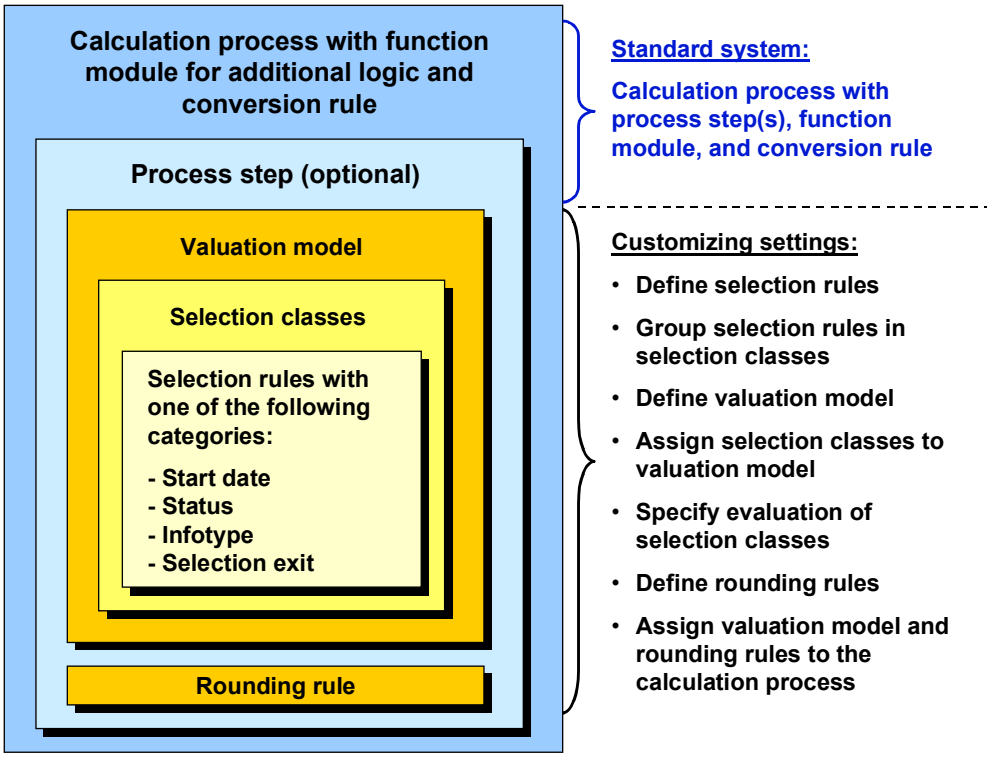
Calculation of Employment Period

- Determination of interruption periods
- Determination of a priority (sequence) for overlapping periods, if applicable
- Rounding of durations according to specific rounding rules
- Conversion of time specifications with a conversion rule

Example of Employment Period Calculation

You want to determine the period of employment for your employees for the company pension scheme. You must first make the necessary settings under Customizing for *Personnel Administration → Evaluation Bases → Employment Period Calculation.*

Setting Up the Employment Period Calculation in Customizing



The calculation process is defined by SAP and includes any required process steps, the function module for the additional calculation process logic, and the conversion rule.

For example, for your company pension scheme, you can use the calculation process 1SVY, included in the standard system. This calculation process contains neither process steps nor a function module for additional logic.

You now define a valuation model with the required selection classes and rules for this calculation process. You can either modify a standard valuation model or create your own valuation model.

We recommend that you create a draft valuation model on paper before you start to set up the model in Customizing. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period → Valuation Model → Draft Valuation Model.*

Creation of a Paper Draft

Example of Employment Period Calculation

The definition of selection rules is dependent on which employee data is to be entered, in other words, which infotypes will provide the periods and date-based durations [Ext.]. This is shown in the following example.

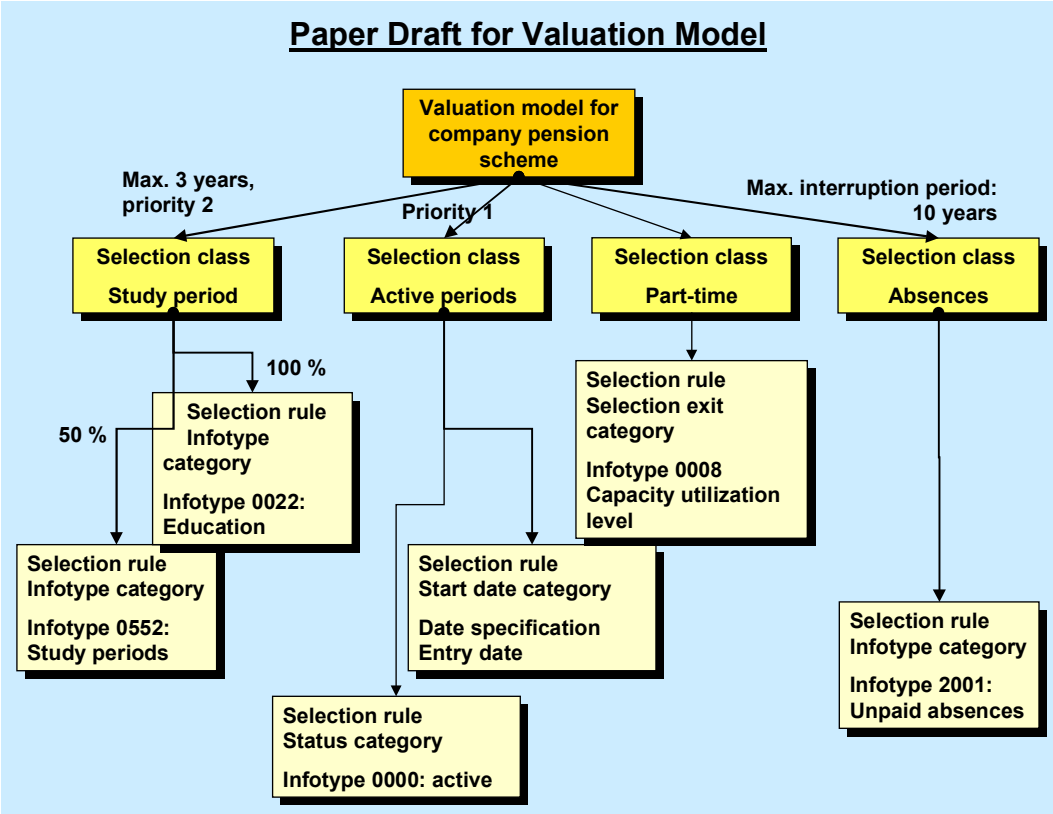
The following time periods exist for the employee Sarah Strong. They are stored in the following infotypes:

Time specification	From	To	In infotype
Study period	01.10.1979	31.03.1983	*Time Specifications/ Employment Period* (0552)
Training in company	01.07.1983	31.12.1983	*Education* (0022)
Active	Start on 05/15/1983	System start on 01/01/1990	*Date Specifications* (0041)
Active	System start on 01/01/1990	End of evaluation period	*Actions* (0000)
Unpaid leave	01.10.1991	31.03.1992	*Absences* (2001)
Part-time (50%)	01.04.1992	30.11.1996	*Basic Pay* (0008)

The following company rules apply:

- Training and study period are imputed to a maximum value [Page 280] of three years.
- Study periods are weighted [Page 278] at 50 percent, training periods are weighted at 100 percent.
- If study/training periods overlap in the *Education* infotype and have the **active** status in the *Actions* infotype, the last period has the higher priority.
- If an unpaid absence lasts more than 10 years, the previous employment periods are no longer imputed (duration of interruption period [Page 284]).

To ensure that these periods are evaluated when the employment period is calculated, you must create a separate selection rule for each type of time specification. A paper draft of your valuation model may be as follows:



If you have set up a valuation model in Customizing, you can check this with report RPUSEN20 (*Evaluation of IMG Settings for Employment Period Calculation*). This report can be found in Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period → Utilities → Display Settings for Employment Period Calculation.*

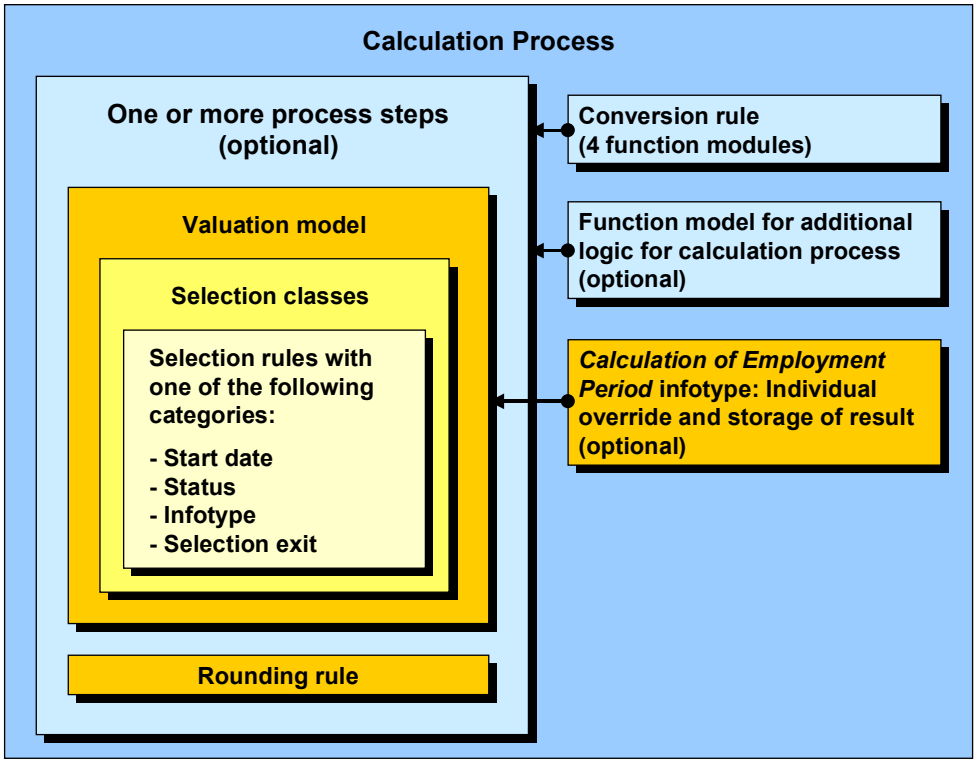
The step *Start Test Utility for Employment Period Calculation.* This starts report RPUSEN10 (*Test Utility for Employment Period Calculation*). With this report, you can test the evaluation of a calculation process or a valuation model for single personnel numbers.

Overview of Objects Used in Employment Period Calculation

Definition

The objects used to calculate the employment period are linked in a technical context. The graphic and the following table show how the individual objects are linked.

You can check the current Customizing settings for a particular calculation process or for a particular valuation model with report RPUSEN20 (*Evaluation of IMG Settings for Employment Period Calculation*). This report can be found in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Utilities* → *Display Settings for Employment Period Calculation.*



Tabular Overview

Object	Definition
Calculation process [Page 248]	The calculation process contains all functions required to calculate an employment period.

Process step [Page 250]	The process step is part of a calculation process for employment period calculation and contains a valuation model.
Valuation model [Page 254]	The valuation model defines an evaluation of selection classes
Selection class [Page 256]	The selection class is a group of selection rules that are evaluated in the same way.
Selection rule [Page 259]	The selection rule defines which employee data is selected for the employment period calculation by the SAP System. The selection rule is classified in one of four categories.
Rounding rule [Page 268]	The rounding rule defines how a period is rounded using the year, month, day, and, if necessary, decimal day.
Conversion rule [Page 252]	The conversion rule defines how individual periods and date specifications are calculated.
Function module for additional calculation process logic [Page 248]	The function module for the calculation process also includes the additional logic for the result as well as the call for the calculation module.
Calculation of Employment Period infotype (0553) [Page 289]	The *Calculation of Employment Period* infotype (0553) is used to monitor an employment period calculation run and to store the result. A function module for the additional calculation process logic is required for this.

Calculation Process

Definition

The *calculation process* contains all functions required to calculate an employment period.

Use

The calculation processes for the employment period calculation are defined by SAP. If you use a standard calculation process, it is not necessary to define a new calculation process. If required, you can override the attributes for an SAP calculation process. It is only necessary to define a new calculation process if you carry out customer developments.

The individual calculation processes determine the type of employment period calculation [Ext.]. Each calculation process refers to a specific element of the calculation of an employment period, for example:

- Calculation of employment period for an entitlement to a company pension
- Calculation of the employment period for the leave entitlement
- Calculation of the employment period for a pay scale reclassification

A calculation process can contain one or more process steps [Page 250]. Each process step contains a valuation model [Page 254]. If a calculation process does not contain a process step, the valuation model is assigned directly to the calculation process.

The calculation process corresponds to the subtype of the *Calculation of Employment Period* infotype (0533). When you create a record for this infotype, enter the required calculation process.

Structure

For more information on calculation processes, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Define Calculation Process.* These calculation processes are country-dependent. This is because a calculation process usually refers to one country only and cannot be used in other countries.

In this step, you can create your own calculation processes in the customer name range. If you define your own calculation processes, the key for the process should start with **x**, **y**, **z** or **9**. It is not usually necessary to define your own calculation processes because you can use a standard SAP calculation process.

You want to determine the period of employment for your employees for the company pension scheme. You use the calculation process ISVY (*Length of Service*) to calculate the employment period and, if necessary, you can override the attributes.

You make the following settings in Customizing for *Personnel Administration* → *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Override Attributes for Calculation Process.*

- **Conversion rule for durations and date specifications**

  The conversion rule [Page 252] calculates periods or date specifications in accordance with statutory or collective agreement regulations. A conversion rule is already assigned to each SAP calculation process.

- **Function module for additional logic for calculation process**

  A function module for the additional logic is required in the following cases:

  – The calculation process is split into several process steps.

    In this case, the function module controls the relationship of the process steps with each other. The function module also defines the further processing of the results from the individual process steps.

  – You want to calculate the employment period directly in the *Calculation of Employment Period* infotype (0553).

    The function module is called by the SAP System if you choose *Run Calculation* in this infotype. If the *Store result* indicator is flagged, you can save the result of the calculation in a record in the *Calculation of Employment Period* infotype and, if required, use it in other processes. Depending on the definition in the *Result type* field, the result is displayed as a **`duration`** or **`key date`**.

    The function module for the additional logic for the calculation process must return a duration or key date as the result.

- **Individual override of valuation model**

  If the indicator in the *Individual override for valuation model* is set, the input fields for a *different valuation model* are shown in the *Calculation of Employment Period* infotype (0533). If you enter a different valuation model, you override the valuation model that is assigned in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Assign Valuation Model and Rounding Rule to Process Step.*

Process Step

Definition

The process step is part of a calculation process [Page 248] for employment period calculation and contains a valuation model [Page 254].

Use

The calculation processes for the employment period calculation are defined by SAP. If you use a standard calculation process, it is not usually necessary to make additional Customizing settings for the process steps. You only need to define process steps if you create a new calculation process in your customer developments.

Each calculation process can contain one or more process steps. The number of process steps is defined by the calculation process. Usually, only one process step is required for a calculation process. Several process steps are necessary if, for example, different statutory or collective agreement regulations exist and a comparison calculation must take place.

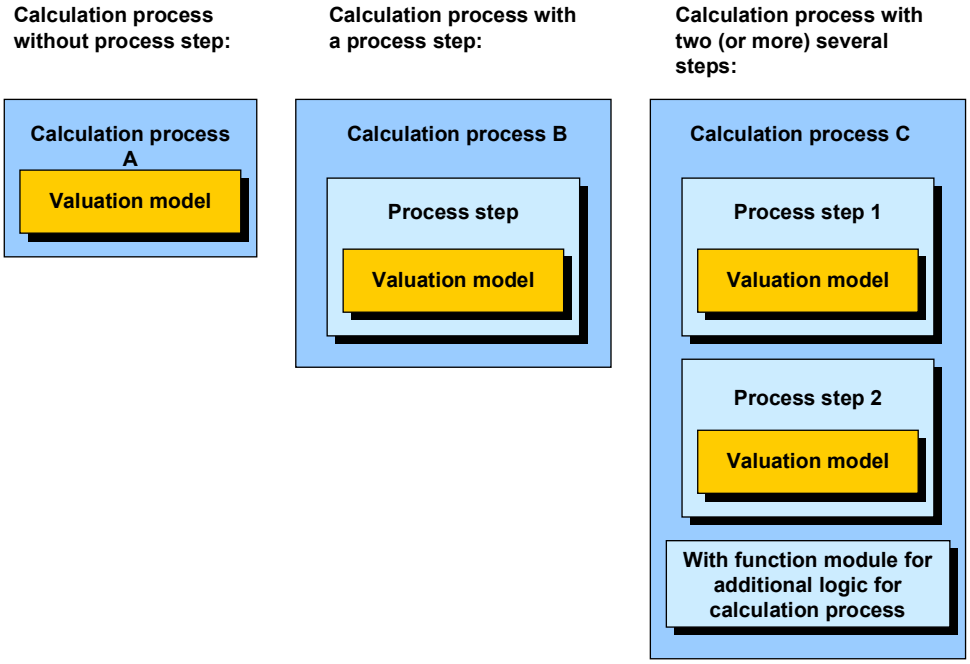
If a calculation process contains more than one process step, a function module for the additional logic [Page 248] must also be assigned to this calculation process. This function module creates the link between the individual process steps and thus determines the sequence of the calculations.

The period of employment should be calculated according to both old and new laws. The SAP System should use the result that is more favorable to the employee. Two process steps are required for this: a process step for the old law and a process step for the new law. The more favorable result is determined with the function module for additional logic.

Structure

The following graphic shows how the process step is positioned between the calculation process and the valuation model. If a calculation process does not contain a process step, the valuation model is assigned directly to the calculation process.

Calculation Process, Process Step, Valuation Model



For more information on process steps for SAP calculation processes, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Define Process Step.* Like calculation processes, the process steps are country-dependent.

You cannot change the assignment of process steps to SAP calculation processes. However, you can assign the required process steps to your own calculation processes.

If you use four or more process steps in a calculation process, you can override a maximum of three process steps with a different valuation model in the *Calculation of Employment Period* infotype (0553).

Integration

Each process step contains a valuation model. You assign the valuation model in Customizing for *Personnel Administration* under *Evaluation Bases* → *Employment Period Calculation* → *Calculation Process* → *Assign Valuation Model and Rounding Rule to Process Step.* Here, you can also define the dependency on the employee's organizational assignment for the valuation model using feature SENOR.

Conversion Rule

Definition

The conversion rule defines how individual periods and date specifications are calculated.

Use

The conversion rules for the employment period calculation are defined by SAP. If you use a standard calculation process, it is not usually necessary to make additional Customizing settings for the conversion rules. You only need to define conversion rules if you create a new calculation process in your customer developments.

The conversion rule enables you to use calculate periods and date specifications in accordance with statutory or collective agreement regulations When a valuation model is valuated in the calculation process [Page 248], the function modules are based on the conversion rule.

The conversion rule is different from the calculation type [Page 274]. The conversion rule refers to the conversion of the smallest time units; **duration** and **date**. In contrast, the calculation type refers to the determination of duration, and start or end of the whole employment period.

You want to determine the period of employment for your employees for the company pension scheme. The following regulations should be converted in the calculation:

- The employment period is to be expressed in years and days (without months). To do this, the individual intervals must be converted into appropriate durations.
- A year always has 365 days. The switch year is also calculated with 365 days.
- If a period is weighted, days are rounded starting at 0.5 days.

The following table shows how the conversion rule is used in this example.

Structure

You define the conversion rules in Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period → Define Conversion Rule.* In , you can find four function modules that are assigned to the conversion rule. Four function modules must be entered for each conversion rule so that all periods and date specifications can be calculated.

The Four Function Modules in a Conversion Rule

Task	Definition	Use in the example
Duration of an interval	Determines the accompanying duration for an interval that is defined by a start and end date	Start date: 01/01/1997 End date: 15.04.1998 Duration: 1 year, (31 + 28 + 31 + 15) days = 1 year, 105 days

Weighting of a duration	Weights a duration with a weighting factor given by a numerator and denominator	2 years, 21 days Weighting factor: 50/100 10.5 days are rounded up: = 1 year, 11 days
Cumulation of durations	Calculates the total for a table of durations	+ 1 year, 200 days + 1 year, 170 days = 3 year, 5 days
Calculation of a date	Determines the end date for an interval that is defined by a start date and duration	Start date: 01/01/1997 Duration: 1 year, 46 days End date: 1 year, +31 + 15 days = 15.02.1998

If you create a new conversion rule, you can use the standard SAP function modules as a template and copy them.

Function Modules as Templates for the Conversion Rule

Task	Template
Conversion of the duration of an interval	HR_SEN_TEMPLATE_DURATION
Weighting of a duration	HR_SEN_TEMPLATE_WEIGHT
Cumulation of durations	HR_SEN_TEMPLATE_SUM
Calculation of a date	HR_SEN_TEMPLATE_DATE

For more information on function modules, see *Displaying Documentation.*

Integration

A conversion rule is already assigned to each SAP calculation process [Page 248]. This assignment can be found in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Define Calculation Process.*

Valuation Model

Definition

The valuation model defines an evaluation of selection classes [Page 256].

Use

The valuation model is a Customizing setting for the calculation of employment periods. To make the required settings, work through the *Valuation Model* section in Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period.* We recommend that you work through the steps in the defined sequence. Take particular note of the *Draft Valuation Model* step.

You use a valuation model to define how employee data in the individual infotype records is evaluated when the employment period is calculated [Ext.]. The SAP System selects the relevant periods using the selection classes and accompanying selection rules that are assigned to the valuation model.

To determine the employment period for the company pension, you need the following information from the SAP System.

- Training and study periods from the *Education* (0022) and *Time Specifications/Employment Period* (0552) infotypes
- Active periods with capacity utilization level from the *Actions* (0000) and *Basic Pay* (0008) infotypes
- Unpaid absences from the *Absences* infotype (2001)

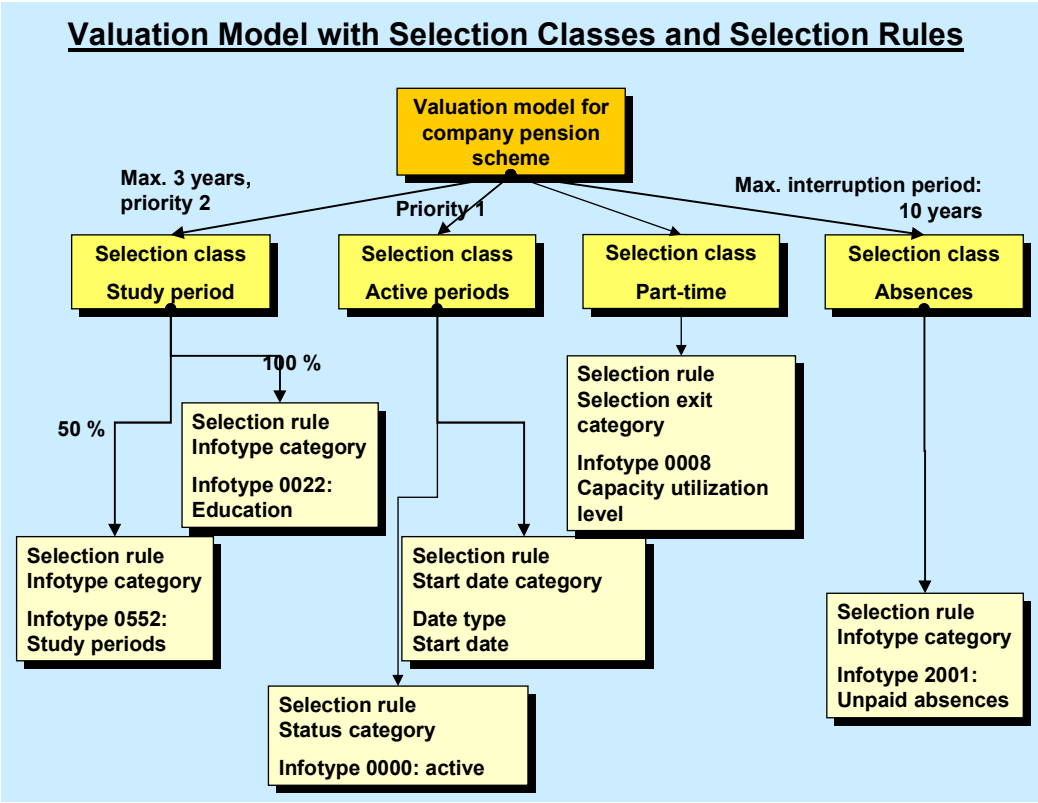
For the company pension you need a valuation model with selection classes and rules which select all relevant periods from the above infotypes.

In the valuation model, you define the evaluation for each individual selection class. To do this, set up the following functions in Customizing for *Personnel Administration* under *Evaluation Bases → Valuation Model → Define Valuation Model.*

- Weighting periods in the evaluation [Page 278]
- Threshold value and maximum value for periods [Page 280]
- Priority of periods [Page 282]
- Determination of interruption periods [Page 284]

Integration

The following graphic shows the link between a valuation model, the assigned selection classes, and the accompanying selection rules. The above functions for employment calculation are used for some selection classes and rules.



Each valuation model is assigned to a calculation process [Page 248] or to a process step [Page 250] in the calculation process. This step can be found in Customizing for *Personnel Administration* under *Evaluation Bases* → *Employment Period Calculation* → *Calculation Process* → *Assign Valuation Model and Rounding Rule to Process Step.* The assignment of a rounding rule to the valuation model is not obligatory.

You can check the current Customizing settings for a particular calculation process or for a particular valuation model with report RPUSEN20 (*Evaluation of IMG Settings for Employment Period Calculation*). This report can be found in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Utilities* → *Display Settings for Employment Period Calculation.*

Selection Class

Definition

The selection class is a combination of selection rules [Page 259] that are evaluated in the same way.

Use

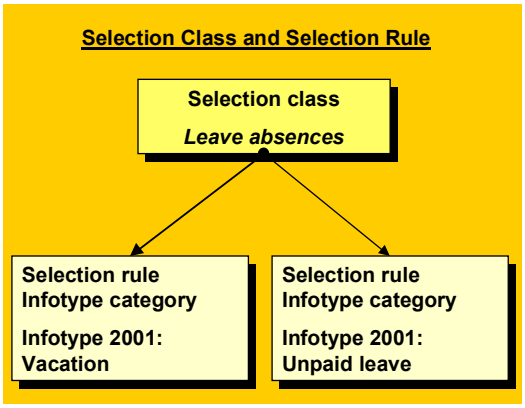
The selection class is a Customizing setting for the calculation of employment periods. To make the required settings, work through the *Valuation Model* section in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period.* We recommend that you work through the steps in the defined sequence.

You use the selection to group together selection rules to be valuated in the same way.

In the SAP System, you can store the leave absences in different absence types. If you want to include all types of absences in an evaluation, you must define a selection rule for each absence type.

You can group together these selection rules in a *Leave Absences* selection class. This means that you can then define an upper and lower limit (maximum value or threshold value) in the valuation model for all leave absences.

The following graphic shows that the selection class *Leave Absences* contains two selection rules. Both selection rules evaluate the *Absences* infotype (2001), however, they select different absence types (different subtypes).



Structure

You create your selection classes and assign them to the respective selection rules in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Define Selection Classes*.

Within a selection class, you can enter only selection rules **without** a weighting factor or only selection rules **with** a weighting factor.

If a selection class contains selection rules **with** a weighting factor, no generated periods can overlap when the selection classes are evaluated.

The *With weighting factor* indicator is not related to the weighting with the numerator/denominator combination for the selection class. Instead, it shows whether the selection rules within a selection class have a weighting factor. Weighting using the selection class is independent of the weighting of individual periods in selection rules with the *With weighting factor* type.

Integration

You define the evaluation of the assigned selection classes in the valuation model [Page 254]. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Define Valuation Model.* Here you can define the following evaluations:

- You can assign a weighting factor to a selection class.

  This weighting factor is then used for all periods that are grouped together in this selection class. The weighting factor for the selection class is not dependent on the *With weighting factor* indicator. For more information, see Weighting Periods [Page 278].

- You can define a standard upper and lower threshold for the selection class.

  For more information, see Maximum Value and Threshold Value for Periods [Page 280].

- You can group together selection rules that are decisive for the interruption relevance of the selection class and flag this selection class as *Interruption-relevant.*

  For more information, see Determination of Interruption Periods [Page 284].

- You can define a priority for particular selection classes within a valuation model.

  This means that you specify which period takes precedence when periods overlap. For more information, see Priority of Periods [Page 282].

Special Class

Definition

The special class identifies special country-specific or statutory requirements for the evaluation of a selection class [Page 256].

Use

For each selection class that covers special requirements, you define a special class. The special class is taken into account when the respective selection class is evaluated in the valuation model [Page 254].

You assign a special class to a selection class in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Define Selection Class.*

The standard system contains two specifications for special classes:

- Remaining periods(Public Sector Austria)

  Remaining periods are gaps in the employment period that exist after the periods have been evaluated in the valuation model. When these gaps are grouped together in a selection class, you can assign the special class *Remaining Periods* to this selection class.

  This selection class must **not** contain any selection rules.

  In addition, a valuation model can contain only one selection class with the *Remaining Periods* special class since it can only be called once when the valuation model is evaluated.

- Weighting, threshold value, maximum value for date-based durations [Ext.] cannot be used

  The weighting [Page 278] and threshold value and maximum value [Page 280] functions are used for each selection class in the evaluation in the valuation model. In a selection class with this special class, the functions are only used for periods and not for date-based durations.

Selection Rule

Definition

The selection rule defines which employee data is selected for the employment period calculation [Ext.] by the SAP System.

Use

The selection rule is a Customizing setting for the calculation of employment periods. To make the required settings, work through the *Valuation Model* section in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period.* We recommend that you work through the steps in the defined sequence.

You use the selection rule to determine which periods the SAP System generates from the infotypes and transfers for evaluation.

Example

You want to determine the period of employment for your employees for the company pension scheme. The following time periods exist for the salaried employee Sarah Smith:

Time specification	From	To	Infotype
Study period	10/01/1979	03/31/1983	*Time Specifications/ Employment Period* (0552)
Training in company	07/01/1983	12/31/1983	*Education* (0022)
Active	Start on 05/15/1983	System start on 01/01/1990	*Date Specifications* (0041)
Active	System start on 01/01/1990	End of evaluation period	*Actions* (0000)
Unpaid leave	10/01/1991	03/30/1992	*Absences* (2001)
Part-time (50%)	04/01/1992	11/30/1996	*Basic Pay* (0008)

To ensure that these periods are evaluated when the employment period is calculated, you must create a separate selection rule for each type of time specification.

Structure

There are four different categories of selection rule. You only define one category for each selection rule.

Categories for Selection Rules

Category	Meaning

Start date [Page 261]	Generates **one** interval from a date specification, example, an entry date and a defined end date.
Status [Page 263]	Generates periods from the *Actions* infotype (0000), provided the specified criteria correspond to the data in the *Status* group box in the *Actions* infotype. The intervals consist of the start date and end date for each infotype record.
Infotype [Page 264]	Generates periods from each existing record for the specified infotype and subtype. Records can be generated if the infotype (or specific infotype data) exists.
Selection exit [Page 266]	Generated periods from a programmed selection exit.

In addition to the category, you can also change time conditions for the selection rule:

- You can define a maximum value or a threshold value for single, generated periods.

  This means that the SAP System compares individual selection periods with an upper or lower limit. For more information, see Maximum Value and Threshold Value for Periods [Page 280].

- You can specify that the start date is always moved to the first day and the end date is always moved to the last day of a month or year.

You define the category and time constraints for the selection rule in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Selection Rule* → *Define Selection Rule*.

Integration

The selection rules are then grouped together in selection classes [Page 256]. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Define Selection Class.*

The selection classes are then assigned to a valuation model [Page 254], together with the selection rules.

Start Date Category

Definition

The *Start Date* category is one of four categories used to classify a selection rule according to the type of selection.

Use

You can use a selection rule in the *Start Date* category to generate **one** time interval that lies before the employee's start date (from the *Actions* infotype (0000)).

You want to determine how long your employee has been working at your company. To do this, you first evaluate the `active` employment status in the *Actions* infotype (0000). However, you must also take any periods before the system start date into account. You use a selection rule to evaluate the *Actions* infotype and also to determine the periods before the system start date.

To determine the periods before the system start date, choose a selection rule in the *Start Date* category. The system should generate a time interval using the first start date, or alternatively a date entered manually, and the day before the first personnel action for the employee. For the start date, assign the value 1 for *Priority for initial entry date,* and value 2 for *Priority for date type.* For the date type, choose, for example, `01` for the technical entry date (standard system). For the end date, choose `Day before first personnel action for employee.`

Structure

Enter one or more start dates and one end date for the time interval to be generated by the SAP System. You can enter a priority for the start date that lies between the possible start dates. You define the priority using a number. The highest priority has the value `1`. You can only enter each value once. The priorities define the order in which the SAP System searches for the date. The search ends when the first date is found.

Start Date for a Time Interval

Type of Start Date	Explanation
Date type	Determines the start date from the *date type* entered in the *Date Specifications* infotype (0041), for example, from the date type for a technical entry date.
Initial entry date	Determines the start date from the *Initial entry date* field in the *Contract Elements* infotype (0016)
Entry date into group	Determines the start date from the *Entry into group* field in the *Contract Elements* infotype (0016)
Calculated entry date	Determines the start date using the function module HR_ENTRY_DATE

Start Date Category

Result of calculation process	Determines the start date from the result of the specified calculated process The result must be saved in a corresponding record in the Calculation of Employment Period infotype [Page 289].

To generate a time interval, the SAP System requires the end date for a start date. You can define one of the following dates as an end date:

- Day before the first personnel action for an employee
- Day before the start of an evaluation period
- End of evaluation period

Status Category

Definition

The *Status* category is one of four categories used to classify a selection rule according to the type of selection.

Use

You use a selection rule in the *Status* category to select periods in which the employee has a particular status indicator in the *Actions* infotype (0000).

You want to use the selection rule to select all periods in which the employee was employed in the company. To do this, define the **`Employment`** status with the status indicator **`active`**.

Structure

This category contains two data fields:

- The *Status* field in the selection rule refers to the following input fields in the group box with the same name in the *Actions* infotype:
  - *Customer-defined*
  - *Employment*
  - *Special payment*
- The *Status indicator* field refers to a particular selection in one of these three fields.

When the employment period is calculated, the SAP System uses all periods in which the employee has the specified *status indicator* for the corresponding *status* in the *Actions* infotype. The periods consist of the start date and end date for each infotype record.

If a employee leaves the company and is then rehired, the interruption period is taken from the *Actions* infotype. This is not usually used from the other infotypes. For example, the *Basic Pay* infotype (0008) cannot be delimited when the employee leaves the company.

Infotype Category

Definition

The *Infotype* category is one of four categories used to classify a selection rule according to the type of selection.

Use

You use a selection rule in the *Infotype* category to select periods if

- A record exists for the employee for the specified infotype or subtype (**infotype existence**)
- Specific fields in an infotype or subtype contain the required values (**infotype content**)

Periods when the employee takes unpaid leave should not be included in evaluations for the company pension.

Unpaid absences are saved in the SAP System in the corresponding subtype of the *Absence* infotype (2001). You create a selection rule and choose the *Infotype Existence* entry in the *Infotype* category. Enter `2001` as the infotype (Absences); enter the identifier for the absence type as the subtype.

Structure

Infotype existence

The SAP System generates a period as soon as a record exists for the specified infotype or subtype. The validity periods for the individual infotype records are used as the time intervals.

A exception is the Time Specifications/Employment Period [Page 286] infotype (0552). Depending on how the time specification type has been defined, you receive either a period, a weighted period, or a date-based duration [Ext.]. This is dependent on which *imputation* you have chosen for the *period* or *key date* specification. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Time Specifications/Employment Period* → *Define Time Specification Types.*

You want to impute the time specification *Previous Employment Period* in the *Time Specifications/Employment Period* at a rate of one third. To do this, you define a time specification type for the *Previous Employment Periods* time specification type. This time specification type requires the input of a `period` and the imputation of a `factor with numerator and denominator`.

When you create a record with the *Previous Employment Period* subtype, fields for the input of a numerator/denominator combination are shown. You enter `1` as the numerator and `3` as the denominator so that the SAP System imputes the individual time specifications at a third.

Returned Time Interval for the *Time Specification/Employment Periods* Based on the Definition of the Time Specification Type

Imputation	Period	Key date
Duration in years, months, days	Date-based duration	Date-based duration
Percentage rate	Weighted period	(combination not possible)
Factor with numerator and denominator	Weighted period	(combination not possible)
No additional specification	Period	(combination not possible)

If you create a selection rule in the *Infotype* category, we recommend that you work through the sequence of steps in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation model* → *Selection Rule.*

You can only select infotypes in the *Infotype* field that are permitted for the selection rules in the *Infotype* category. You perform this step in *Check Permitted Infotypes for Selection Rule.*

You cannot delete the standard infotypes in this step. To deactivate the permissibility of an infotype, delete the *Permissibility* indicator.

Infotype contents

For this definition, the SAP System generates a period if particular fields in an infotype or subtype contain the required values for an employee.

A selection condition is required so that the SAP System can query the values of particular infotype fields. If the required value exists, a time interval is generated from the validity period for each infotype record. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Selection Rule* → *Define Selection Conditions for Infotypes.* We recommend that you work through the steps in the *Selection Rule* section in the defined sequence.

Selection Exit Category

Definition

The *Selection Exit* category is one of four categories used to classify a selection rule according to the type of selection.

Use

The selection exits for the employment period calculation are defined by SAP. If you use a standard calculation process, it is not usually necessary to make additional Customizing settings for the selection exit. You only need to define a selection exit if you create a new calculation process in your customer developments.

You use a selection rule in the *Selection Exit* category to cover different requirements of a selection rule. One of the following selections can be programmed with the selection exit:

- Selection of periods
- Selection of weighted periods
- Selection of date-based durations [Ext.]

Selection exit without weighting factor

When an employment period is calculated, the employment periods for an employee within the validity period of a fixed-term contract are not taken into account. If the employee has a fixed-term contract, the employment period for this time period should be zero. To do this, create a selection exit to evaluate the table T547V (*Contract Types*) according to the *Fixed-term contract* indicator (field CTLTD). If the indicator is set, the selected periods are not taken into account. The selection **class** to which this selection rule belongs receives a zero weighting.

Selection exit with weighting factor

The employment periods for an employee should be weighted using the capacity utilization level from the *Basic Pay* infotype (0008) for the duration of a part-time employment contract. A selection exit is required to select and transfer the periods with the accompanying capacity utilization level as the weighting factor. The standard system contains the selection exit 0008 (*Weighting CUL from Infotype 0008*).

If a selection exit returns weighted periods, you should set the *With weighting factor* indicator when the selection exit is defined.

Structure

To create the selection exit, choose Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Selection Rule* → *Define Selection Exit.* You must maintain the following values:

- **Function module for evaluation**

  Each selection exit contains a function module for the evaluation of the selection exit. This function module returns the found periods, weighted periods, or date-based periods.

- **Weighting for a period**

  The *With weighting factor* indicator defines whether the numerator and denominator are taken into account in further processing. If the indicator is set, the existing values are used. If any fields are not filled (as in the third line of the following period table), the evaluation takes place as if the employee was inactive in this period.

- **Function module for value help**

  To restrict the selection by the function module performing the evaluation, you can enter a selection value. You can make the selection exit dependent on a criterion. This selection value is determined by a function module for value help.

Example

Return Value of Function Module for Evaluation

Start date	End date	Numerator	Denominator
01/01/1997	02/15/1998	50	100
02/16/1998	12/31/1998	100	100
01/01/1999	06/30/1999		

Rounding Rule

Definition

The rounding rule defines how a period is rounded using the year, month, day, and, if necessary, decimal day.

Use

The rounding rule is a Customizing setting for the calculation of employment periods. When you define and assign a rounding rule, note that, in general, 30 days are converted into a month, and 12 months are converted into a year.

Only use a rounding rule if the calculation process is evaluated in **years-months-days** with the conversion rule [Page 252].

Otherwise, the rounding rule generates unwanted results. If the evaluation uses days, the rounding rule would convert a result of 80 days to 2 months and 20 days.

In the rounding rule, you can specify how the SAP System should round decimal days, days, and months. The system always rounds to the next unit up:

- Decimal days to full days
- Days to months
- Months to years

Structure

You define the rounding rules in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Define Rounding Rules.* You can define a limit or rounding up procedure for the decimal days, days, and months time units. If you round up, you must specify the number of time units from which the SAP System will start to round up. Alternatively, for the time units *day* and *month*, you can specify that the SAP System should not round up the values.

- **Limiting a time unit**

  The SAP System cuts off the time unit. This is an exclusive form of rounding.

  The following time specifications exist:

  5 years, 6 months, 17 days

  If you want to limit the days, the time specification is rounded as follows:

  5 years, 6 months

- **Rounding a time unit from [number of time units]**

  You can specify the number of units from which the time unit is rounded. If the specified number is not reached, the SAP System rounds down the time unit.

The following time specifications exist:

5 years, 6 months, 17 days, 0.7 decimal days

If you select *round up from* and define 0.50 decimal days as the comparison value, the time specification is rounded as follows:

5 years, 6 months, 18 days

Rounding for the larger units (for example, months) is based on the result generated when the smaller units (for example, days) are rounded.

Integration

The rounding rule is assigned to a calculation process or to its process step. This step can be found in Customizing for *Personnel Administration* under *Evaluation Bases* → *Employment Period Calculation* → *Calculation Process* → *Assign Valuation Model and Rounding Rule to Process Step.*

General Process of Employment Period Calculation

Purpose

With this process, you calculate an employment period within a HR application component in the SAP System. The required employment period can be a particular duration (for example, length of service on company, duration of all absences in the calendar year), or a particular key date (for example, date of 25th anniversary).

Prerequisites

To calculate the employment period [Ext.], the SAP System requires a calculation process with the necessary process steps. A valuation model must be assigned to the calculation process or to its process steps. The valuation model must contain selection classes and rules, which are used by the SAP System to generate the required periods from the employee data. To make the necessary settings, see Customizing for *Personnel Administration* under *Evaluation Bases → Employment Period Calculation.*

If you have set up your system in Customizing, you can check it with report RPUSEN20 (*Evaluation of IMG Settings for Employment Period Calculation*).

To test the evaluation of a calculation process or valuation model for individual employees, run report RPUSEN10 (*Test Utility for Employment Period Calculation*).

You define the conversion rules in Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period → Utilities.*

Process Flow

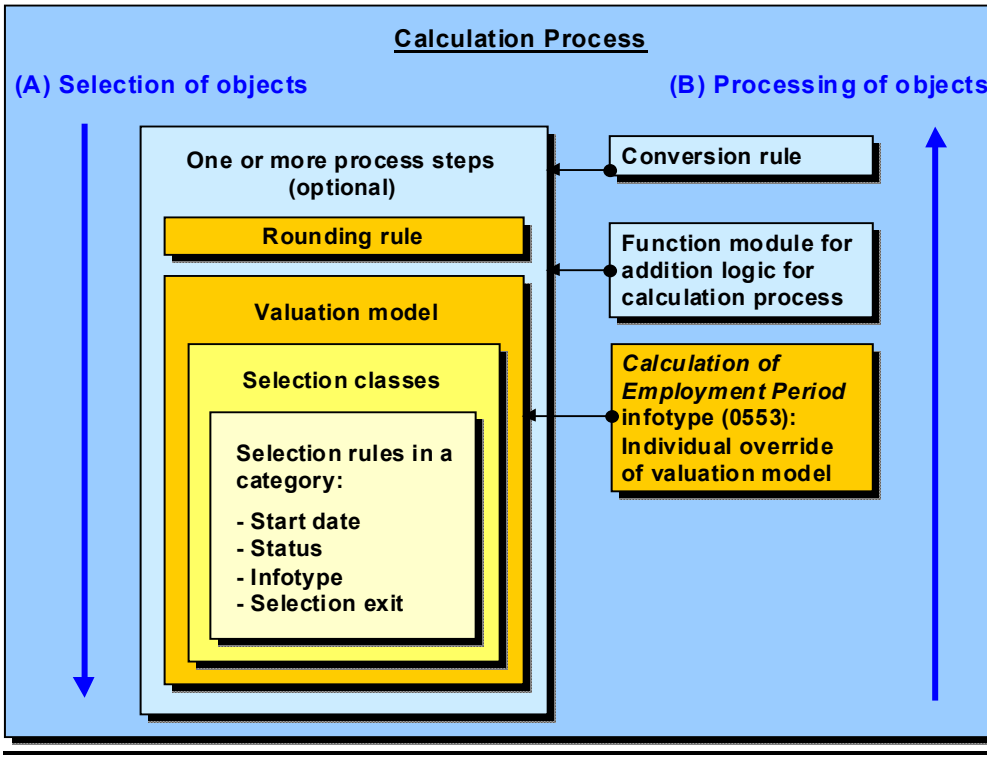
Graphical Representation of Employment Period Calculation Process

A. Selection of objects

The SAP System first checks the required objects for the calculation process, starting at the process step up to the selection rule.

B. Processing of objects

The SAP System then processes the selected objects in reverse order, from the selection rule to the process step.



Description of a process

1. The employment period calculation function is called by the SAP System with a special function module. When they are called, the system uses the calculation process [Page 248] as the import parameter (see also Technical Process of Employment Period Calculation [Page 274]).
2. After the call, the SAP System checks that the calculation process is split into process steps [Page 250] and calls the assigned valuation model for each process step. If no process step exists, the valuation model [Page 254] assigned to the calculation process itself is called. Instead of the assigned valuation model, a different valuation model [Page 289] is called, provided this is permitted in the Customizing settings **and** you have made an appropriate entry in the *Calculation of Employment Period* infotype (0553).
3. The SAP System then determines the selection classes [Page 256] that are assigned to the valuation model and selects the assigned selection rules [Page 259] for each selection class.
4. Finally, the SAP System processes the individual selection rules and selection classes within a valuation model in ten individual steps. The system generates a period, based on the category of selection rule.
   - From a predefined start and end date [Page 261]
   - From the *Actions* infotype (0000) using the Status and Status Indicator [Page 263]
   - From another infotype or subtype [Page 264]
   - Using a selection exit [Page 266]

General Process of Employment Period Calculation

The subsequent processing is dependent on the calculation type that has been defined for the total employment period. One of the following values is determined for the employment period, based on the calculation type:

- Start of employment period
- End of employment period
- Duration of employment period

For more information on the calculation type, see Technical Process of Employment Period Calculation [Page 274].

Processing Steps Within a Valuation Model That Are Dependent on the Calculation Type

Processing step	**Determine *Start of employment period***	**Determine *End of employment period***	**Determine *Duration of employment period***
4.1. Import infotypes	X	X	X
4.2. Processing according to selection rules	X (without threshold value and maximum value)	X	X
4.3. Process priority rules for selection classes	X	X	X
4.4. Determine interruption periods		X	X
4.5. Threshold value and maximum value for selection classes		X	X
4.6. Determine remaining periods	X	X	X
4.7. Assign weighting factors according to selection classes	X	X	X
4.8. Determine periods and date-based durations [Ext.]	X	X	X
4.9. Calculate duration	X (is not logged)	X (is not logged)	X
4.10. Weight duration	X (is not logged)	X (is not logged)	X

5. If a period of time is being determined, the SAP Systems rounds it off using a rounding rule [Page 268]. This step is only performed if a rounding rule is assigned to the calculation process or its process steps.
6. If several process steps are given, they must be processed in a particular order. The function module for additional logic for the calculation process [Page 248] determines this order. This function module also determines the relationship between the results from the individual

valuation models. If necessary, the function module runs a comparison calculation between the individual results.

Result

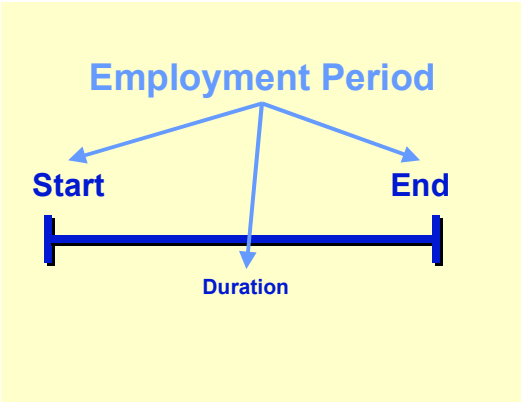
The result of the employment period calculation is a period of time or a key date that can be used for further processing or, if required, for storage in the *Calculation of Employment Period* infotype (0553).

Technical Process of Employment Period Calculation

Purpose

You use this process to calculate an employment period. Employment period information consists of three elements; *start, end,* and *duration* of period.

The Elements in Employment Period Information



Depending on which element the SAP System should calculate, three different calculation types are available:

Calculation type	Prerequisites	Example
(**1**) Duration of an employment period	Start and end date are available	An employee started at the company at =1/01/1960 and is active up to 05/31/1999. You need the duration of this employment period.
(**2**) End of an employment period	Start date and duration are available	An employee was hired on 07/15/1980 and receives a gratuity after an actual employment period of 25 years. You need the end date of this employment period.
(**3**) Start of an employment period	Duration and end date are available	The day on which an employee's last employment year starts is important for a country-specific taxation basis. Absence periods are taken into account. You need the start date of the employment period with the end date 12/31/1999.

Prerequisites

When the employment period calculation function is called, the SAP System must have **at least** the following import parameters:

- Calculation process
- Personnel number
- Calculation type
- Selection date

In addition, **two** of the following three parameters must exist for a **single** calculation process, depending on which calculation type is used: The third parameter is determined using the calculation type:

- Start date
- End date
- Duration

If the calculation process uses additional logic, it is the task of the *function module for the additional logic for the calculation process* to determine the two required import parameters.

Each employment period calculation is started with the function module HR_SEN_CALCULATE_COMPLETE (*Employment Period Calculation for Calculation Process*). This function module is called within an SAP application and must be inserted at the appropriate place by the program developers. The function module is also called if you run a manual calculation in the *Calculation of Employment Period* infotype (0553). It is only possible to call the calculation in the *Calculation of Employment Period* infotype if a *function module for additional logic for the employment period calculation* is assigned to the calculation process.

Process Flow

When the employment period is calculated, the system differentiates between simple calculation processes and calculation processes with additional logic. The latter contains a function module for additional logic [Page 248].

The technical sequence of the individual calculation processes is very different. Therefore, the technical sequence should only be briefly mentioned and is not shown in detail here.

The technical sequence of the employment period is split into the following steps in the SAP System:

1. The SAP System starts the calculation process with the function module HR_SEN_CALCULATE_COMPLETE. This function module imports the required parameters (country grouping, calculation process, personnel number, calculation type, selection date, and so on), and checks these against the calculation type. There are four calculation type specifications:
   - _ (blank) Complete employment period calculation
   - **1** : Calculation of the duration of an employment period
   - **2**: Calculation of the end of an employment period

- **3**: Calculation of the start of an employment period

  If the calculation process uses additional logic, the calculation type need not be entered (blank). However, the additional logic then determines the calculation type.

2. Finally, the SAP System calls the function module HR_SEN_READ_PROCESS (*(Read Control Parameters for Calculation Process*). This function module reads all relevant control information from the imported calculation process. For example, it checks whether the calculation process contains a *function module for additional logic for the calculation process*, and which conversion rule [Page 252] is used for the calculation of durations and date specifications.
3. If a different valuation model [Page 289] is permitted for this calculation process, the function module HR_SEN_VALUATION_MODEL_INDIV (*Read Individual Valuation Model for Employment Period Calculation*) checks that a valuation type is entered in the *Calculation of Employment Period* infotype (0553) and imports it.
4. The subsequent sequence is dependent on whether it is a simple calculation process or a calculation process with additional logic.
   - If it is a simple calculation process, the SAP System calls the general function module HR_SEN_CALCULATE_PROCESS_STEP (*Employment Period Calculation for Calculation Process Step)* directly.
   - If a *function module for additional logic* has been entered, the SAP System first calls this module and processes it. This function module then calls the general function module HR_SEN_CALCULATE_PROCESS_STEP.
5. The SAP System uses the calculation process and accompanying process steps to determine the assigned valuation model and rounding rule [Page 268]. If applicable, the different valuation model is used. The SAP System uses the valuation model to determine the selection classes and selection rules.
6. The individual selection rules generate periods from the employee data and group it in selection classes. The selection class periods are then evaluated in the valuation model.
7. Depending on which calculation type is being used, one of the following three function modules is called:
   - The function module HR_SEN_EVALUATE_DURATION determines the duration from the start and end date.
   - The function module HR_SEN_ASCE_EVALUATE_DATE determines the end date from the start date and duration.
   - The function module HR_SEN_DESC_EVALUATE_DATE determines the start date from the duration and end date.
8. If calculation type **1** was selected, the SAP System rounds the duration at the end of processing using the rounding rule.

Result

When the employment period has been calculated, the SAP System has determined the required duration or date.

Functions for Calculating the Employment Period

Use

You use the employment period calculation functions to control the evaluation of the employee data. You use the functions when you evaluate the selection rules or selection classes within the valuation model.

Features

The Functions for Evaluating the Selection Rules and Selection Classes

Function	Selection Rule	Selection Class
Period weighting [Page 278]	Weight **individual** intervals that are selected using a selection rule with the *With weighting factor* type. This is only possible in selection rules with the *infotype* category (for the *Time Specifications/Employment Period* infotype) and the *Selection exit* category.	Weight **all** periods that are entered in the selection class.
Threshold value and maximum value [Page 280]	The upper and lower limit for **individual** intervals selected by the selection rule.	Upper and lower limit for the **total** of the periods entered grouped in the selection class.
Priority of periods [Page 282]		If periods overlap, periods with the higher priority are transferred for evaluation.
Interruption periods [Page 284]		Selection classes that are flagged as interruption-relevant and gaps must be evaluated in the valuation model.

Weighting Periods in the Evaluation

Use

You use this function to weight selected periods in the evaluation. Note the following difference:

- **Weighting using the selection class**

  You always define a weighting for the selection class. You assign the weighting factor for individual selection classes in Customizing for *Personnel Administration* under *Evaluation Bases → Valuation Model → Define Valuation Model.*

  The SAP System then weights the selection class when it is evaluated in the valuation model. All periods entered using this selection class are weighted with the defined weighting factor.

  You want to assign a double weighting to all occupations involving dangerous work for the company pension scheme. You enter these activities in a selection class and assign this selection class the numerator/denominator combination 2 to 1.

  It is also possible to assign the weighting factor zero to a selection class.

- **Weighting factor for a selection rule**

  The following selection rules can also include a weighting factor for the selected periods:

  – Selection rule in *Infotype* category and Time Specifications/Employment Period infotype (0552) [Page 286], provided that input of a weighted period is defined for the time period type [Ext.].

  – Selection rules for selection exit category [Page 266]

  This is a weighting factor type, not a weighting as for the other selection classes. The selection rules with the *With weighting factor* type can contain different weightings for individual periods.

  If you have already assigned a weighting for a selection class, periods that have been assigned a weighting factor by the selection rule are weighted again. Both weighting factors for this period are multiplied.

Integration

As soon as a selection **rule** is assigned a weighting factor, the weighting factor type *With weighting factor* is also assigned. There are two weighting factor types:

- With weighting factor
- Without weighting factor

The selection class inherits the weighting factor type from the selection rules. If the selection rules in the selection class have the *With weighting factor* type, the corresponding indicator is set. To compare the settings, see Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period → Valuation Model → Define Selection Class.* This indicator is independent of any weighting assigned to the selection class.

Prerequisites

Since the selection class inherits the weighting factor type from its selection rules, it must not contains selection rules with different weighting factor types. All assigned selection rules have either the *With weighting factor* type or all have the *Without weighting factor* type.

When the selection classes are evaluated in a valuation model, no selected periods can overlap within a selection **class** with the *With weighting factor* type. If the periods overlap, the SAP System displays an error message.

Threshold Value and Maximum Value for Periods

Use

You can define a threshold value or maximum value for periods and date-based durations [Ext.] in the selection rule [Page 259] or in the selection class [Page 256].

- The threshold value defines the lower limit of a duration. If a threshold value is used, a duration is only taken into account if it exceeds the given period of time.
- The threshold value defines the upper limit of a duration. The SAP System cuts off the duration of a period when it reaches a certain value.

The employment period calculation functions include two functions for using a threshold value or maximum value:

Threshold value and maximum value in a selection class

If you assign a threshold value or a maximum value in the selection class, the predefined length is used for the total of all durations entered using the selection class.

Training and study periods are to be imputed to a maximum three years for the company pension scheme. In the selection class for these periods, you enter a maximum value of three years.

You assign the values for the selection class in Customizing for *Personnel Administration* under *Evaluation Bases → Valuation Model → Define Valuation Model.*

Threshold value and maximum value in a selection rule

If you assign a threshold value or a maximum value in the selection rule, the predefined length is used for each individual period or date-based duration selected by the selection rules.

Unpaid absences do not affect the employment period if they are less than three days. However, the total duration of unpaid leave should be deducted from the employment period. In the selection rules, you enter a threshold value of three days.

You assign the values for the selection rule in Customizing for *Personnel Administration* under *Evaluation Bases → Valuation Model → Define Selection Rule.*

Prerequisites

A threshold value or maximum value is only taken into account for calculation type **1** (Calculation of the duration of an employment period) and calculation type **2** (Calculation of end of employment period).

The SAP System does **not** use this function for periods calculated using calculation type **3** (Calculation of start of employment period). For more information on the

calculation type, see General Process of Employment Period Calculation [Page 270] and Technical Process of Employment Period Calculation [Page 274].

Features

Maximum Value

The duration above the maximum value is ignored in the selection rule and also in the selection class. If the duration exceeds the specified maximum value, the SAP System reduces the total duration to the predefined maximum value.

The *Cut off above maximum amount* indicator in the selection rule is always set.

Threshold Value

If the duration is greater than the given threshold value, the selection rule and selection class contain different values.

- In the selection class, the SAP System ignores the duration that is less than the threshold value. Durations that are less than the threshold duration are not evaluated.

  You can specify whether the weighting factor for the selection class is taken into account before the threshold value or maximum value is created.

  The *With consideration of weighting factor* indicator is set.

  Calculated duration: 40 days
  Weighting factor: 0.5
  Threshold value: 30 days

  The weighted duration is 20 days and is therefore below the threshold value.. The calculated period is not evaluated.

  (If the indicator was not set, the threshold value duration would reached. The SAP System would then evaluate this period.)

- You have three options in the selection rule:
  - If you have set the *Cut off under threshold value,* the SAP System ignores the duration below the threshold value and only uses the duration that exceeds the threshold value for the evaluation.
  - If you have set the *Only complete calendar units* indicator, the SAP System uses the **complete** duration in the evaluation when the threshold value has reached a full calendar unit.
  - If you have not set the indicator, the SAP System uses the total duration in the evaluation when the threshold value is reached.

    The two indicators (*Cut off under threshold value* and *Only complete calendar units*) cannot be used together.

Priority of Periods

Use

You use this function to define priorities between specific selection classes when a valuation model is evaluated. If periods from priority-relevant selection classes overlap, the SAP System evaluates the period with the highest priority.

The priority is relative. The priorities are only applicable between selection classes to which priorities have been assigned.

A selection class without a priority has the value 0. Periods for these selection classes are not included in the comparison and are transferred for evaluation irrespective of the other priorities.

Activity

To define a selection class priority for the evaluation of the valuation model, see Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period → Valuation Model → Define Valuation Model.*

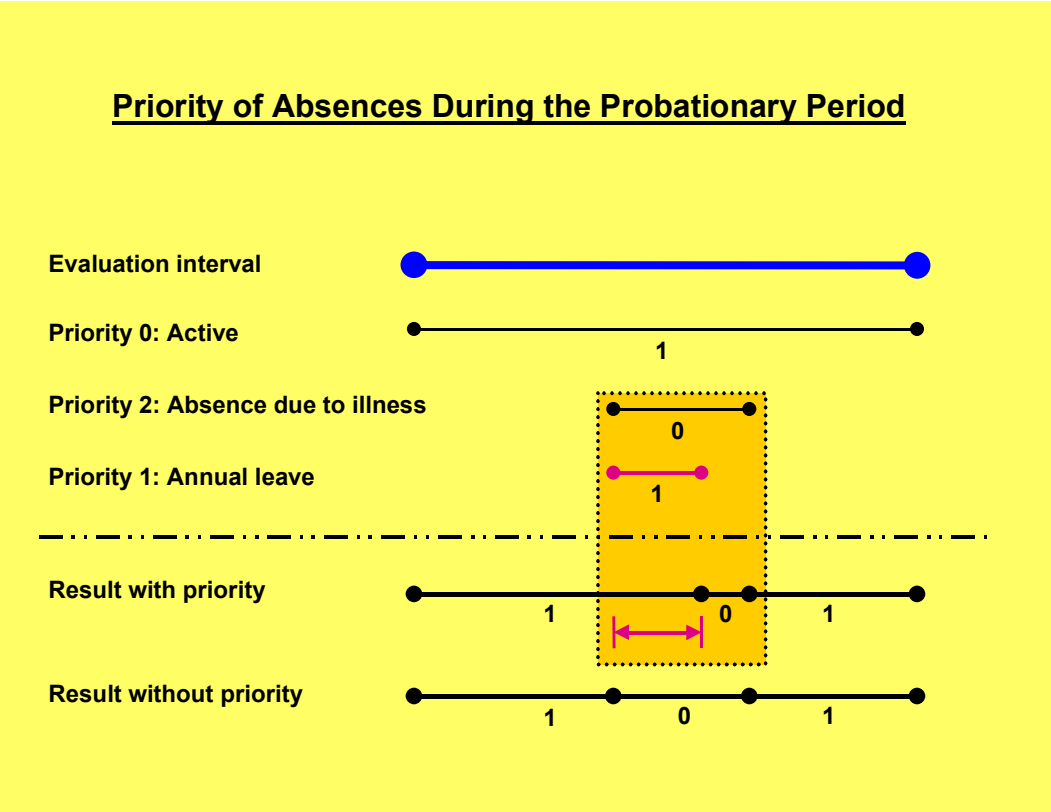
Value `1` has the highest priority. You can only assign a value once. In contrast, the neutral value `0` (standard setting) can occur several times.

Example

In Public Sector payroll for a country, the probationary period is extended due to sick leave. If the employee uses annual leave during this absence period, the probationary period is not extended. The *Annual vacation* absence has a higher priority here than the *Illness* absence. If the *Annual leave* absence overlaps with the *Illness* absence, only the *Annual leave* absence is counted. Other periods, for example, the period of active employment, or the capacity utilization level are not included in this comparison and are not given a priority (indicator 0).

The following graphic shows how priorities between overlapping periods are processed. If a priority was not assigned, the absence due to illness would affect the result since the weightings of 0 and 1 would be multiplied together.

Priority of Periods



Determination of Interruption Periods

Use

You use this function to define the interruption duration from which a postponed employment period is reset to zero and is not imputed.

In Public Sector payroll for a country, the previous employment period is not taken into account if the interruption period is longer than five years. Interruption periods are all periods in which the employee is not employed in the public sector.

An employee was actively employed in the Public Sector from 01 January 1981 to 31 December 1989. This corresponds to an employment period of nine years. This employee then left the Public Sector. If the employee then worked again in the Public Sector from December 31, 1994, the nine year employment period would be imputed. If the employee returns to work in the Public Sector after this date, this employment period is not taken into account.

Integration

The following periods are classed as interruption-relevant:

- Periods of a selection class that is classed as interruption-relevant.

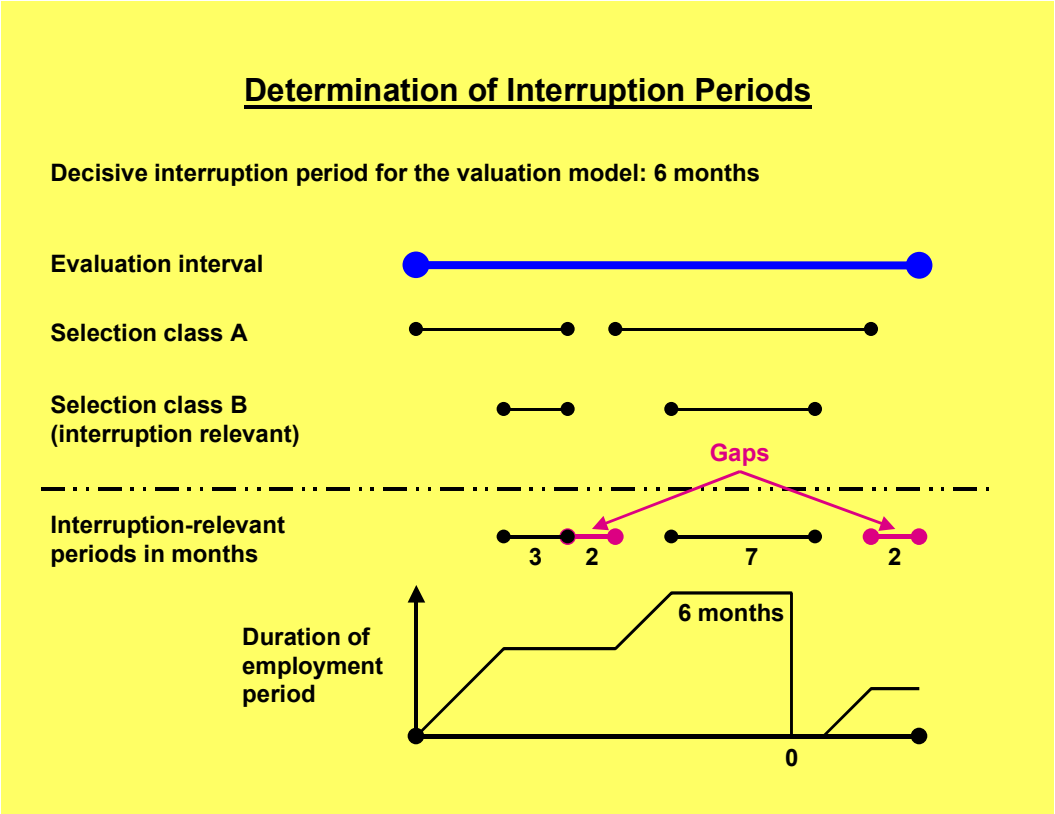
  You assign the *interruption-relevant* indicator for the selection classes in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Valuation Model* → *Define Valuation Model.* You also enter the decisive interruption period here.

- Gaps that occur within the valuation model when the periods have been selected

  The following graphic gives an example.

  You can use the special class Remaining periods [Page 258] to enter gaps after selection via a selection class for Public Sector Austria.

The following graphic shows what happens when the interruption period is reached: The employment period is set to zero. The SAP System takes gaps into account as well as interruption-relevant periods.



Prerequisites

Interruption periods are only taken into account for calculation type **1** (Calculation of the duration of an employment period) and calculation type **2** (Calculation of end of employment period).

The SAP System does **not** use this function for periods calculated using calculation type **3** (Calculation of start of employment period). For more information on the calculation type, see General Process of Employment Period Calculation [Page 270] and Technical Process of Employment Period Calculation [Page 274].

Time Specifications/ Employment Period Infotype (0552)

Definition

The *Time Specifications/Employment Period* infotype (0552) contains additional employment or absence periods for the calculation of the employment period [Ext.].

Use

You use this infotype to enter other periods and date-based durations [Ext.], for example, which are before the date when the employee started working at the company or before the live start of the SAP System. Periods that are already included in other infotypes, for example, in the *Actions* (0000), *Basic Pay* (0008) or *Absences* (2001) infotypes, are not entered in this infotype.

If the system is set up accordingly in Customizing, the data in the *Time Specifications/Employment Period* infotype is selected and evaluated by the SAP System when the employment period is calculated. For this to work, a selection rule [Page 259] must be created with the Infotype category [Page 264].

The *Time Specifications/Employment Period* infotype enables you to enter data in a list as well as individually.

Structure

The *Time Specifications/Employment Period* consists of different subtype with the same time specification types [Ext.].

You define the conversion rules in Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Time Specifications/Employment Period* → *Define Time Specification Types.*

The time specification type defines which type of time specification or employment period is being processed. It also determines the screen layout for the subtype. The following fields are shown in the subtype, depending on the definition of the time specification type:

- Start and end date for the input of a period

  If the period is entered for this time specification type with the start date and end date, the SAP System displays two fields for the input of a validity period.

  If the appropriate settings have been made in Customizing, you can specify a weighting for the time specification. You can choose one of the following options:

  - Input of a percentage rate
  - Input of numerator/denominator combination
- Validity date for the input of a key date

**Time Specifications/
Employment Period Infotype (0552)**

If input of a date-based duration [Ext.] is defined for this time specification type, the SAP System displays a field for the input of a date (instead of a validity period) and three fields for the input of a duration in years/months/days.

Integration

The SAP System uses the validity period entered in the *Time Specifications/Employment Period* infotype (0552) to determine and then display the corresponding duration. The duration is determined using a conversion rule. You define a conversion rule based on the time specification type using the feature CRULE. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Time Specifications/Employment Period* → *Assign Conversion Rule to Time Specification Types for Display.*

See also:

Entering Manual Time Specifications/Employment Periods [Page 288]

Entering Manual Time Specifications/Employment Periods

Use

You use this procedure to enter any employment or absence periods for an employee that cannot be entered in other infotypes. For example, this may be periods before the system start date or before the employee's hiring date.

Prerequisites

To evaluate these employment or absence periods within the employment period calculation [Ext.], you must make the required settings in Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period.* In particular, you must ensure that a selection rule exits with the Infotype category [Page 264]. This selection rule selects the periods from the infotype.

Procedure

1. Choose *Human resources→ Personnel Management → Administration → HR master data → Maintain.*

   The *Maintain HR Master Data* screen appears.

2. Enter the required *personnel number*.

3. In the *Direct selection* group box, enter the *Time Specifications/Employment Period* infotype (0552). In the *STy* field, enter a time specification type.

   If you want to enter several data records for an employee, choose *Goto → List entry* to access a list. You use this list for the fast entry of time specifications or employment periods.

4. Choose *Create.*

   The *Create Time Specifications/Employment Period* screen appears.

5. Enter the required data for the time specification or employment period:

   – Enter the validity period and, if required, a weighting factor for the time interval.

   – For a date-based duration [Ext.], enter the validity period and the duration in years, months, and days.

6. Choose *Save.*

Result

The specification or employment period is saved in the *Time Specification/Employment Period* infotype (0552) and can be selected and evaluated when the employment period is calculated.

Calculation of Employment Period Infotype (0553)

Definition

The *Calculation of Employment Period* infotype (0553) is used to monitor an employment period calculation run [Ext.] and to store the result.

Use

You use this infotype to calculate an employment period manually. You can override the valuation model [Page 254] for a calculation process [Page 248] and, if permitted for the specified calculation process, you can use an individual valuation model.

You can then save the result of the calculation in this infotype and use it for additional functions and processes.

Only save the result of the employment period calculation if this is necessary to comply with statutory or collective agreement regulations.

Structure

The structure of the *Calculation of Employment Period* infotype is dependent on the attributes for the calculation process in question.

The calculation processes for the employment period calculation are defined by SAP. If you are using a standard calculation process, you can override the attributes. For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Override Attributes for Calculation Process.*

The calculation process represents the subtype for this infotype. The following group boxes can be displayed in the *Calculation of Employment Period* infotype, depending on how the attributes for the calculation process have been defined.

- *Different valuation model*

  In this group box, you can assign a different valuation model to a calculation process or its process step. If you specify a different valuation model here, you override the valuation model assigned to the calculation process or process step in Customizing.

  The SAP System displays this group box if the *Individual override* indicator is set for the calculation process in Customizing. You can enter a different valuation model for a maximum of three process steps in a calculation process.

- *Result*

  If you select *Run calculation*, the SAP System displays the result of the employment period calculation as a *duration* or *key date* in this group box. The *key date* represents the start or end date of an employment period.

  The SAP System displays this group box if the *Save result* indicator is set for the calculation process in Customizing and a result type has been entered.

You can only calculate the employment period manually in this infotype if a function module for additional logic [Page 248] has been defined for this calculation process.

See also:

Saving the Results of a Employment Period Calculation [Page 291]

Saving the Results of a Employment Period Calculation

Use

You use this procedure to display and save the results of the employment period calculation [Ext.] in the *Calculation of Employment Period* infotype.

Prerequisites

You can only calculate the employment period in this infotype if the following applies to the calculation process [Page 248]:

- A function module is defined for the additional logic
- Storage of the result is permitted

For more information, see Customizing for *Personnel Administration* under *Evaluation Bases* → *Calculation of Employment Period* → *Calculation Process* → *Define Calculation Process* or *Override Attributes for Calculation Process.*

Procedure

1. Choose *Human resources*→ *Personnel Management* → *Administration* → *HR master data* → *Maintain.*

   The *Maintain HR Master Data* screen appears.

2. Enter the required *personnel number*.
3. In the *Direct selection* group box, enter the *Calculation of Employment Period* infotype (0553). In the *Sty* field, enter a calculation process.
4. Choose *Create.*

   The *Create Employment Period Calculation* screen appears.

5. If required, enter a *different valuation model.*

   This option is only available if it is permitted for the specified calculation process.

6. Choose *Run calculation.*

   The result is displayed in the corresponding fields.

7. Choose *Save.*

Result

The SAP System has calculated the required employment period for the employee and stored the result in the *Calculation of Employment Period* infotype. You can use the saved employment period for other functions and processes in the SAP System.

Views and Tables for the Employment Period Calculation

The following overview shows the technical views and tables that you can use when you set up Customizing for calculation of the employment period. The accompanying Customizing object can be found in Customizing for *Personnel Administration* under *Evaluation Bases → Calculation of Employment Period.*

Technical Name	Name	Accompanying Customizing Object
T525N	Selection Class	Define selection class
T525T	Time specification type for employment period calculation	Define time specification type
T525U	Conversion rules for employment period calculation	Define conversion rules
T525V	Selection exit	Define selection exit
V_T525A_A	Selection rule for employee data	Define selection rule
V_T525E	Rounding rule for time specifications	Define rounding rules
V_T525I_A	Selection condition: infotype selection	Define selection conditions for infotypes
V_T525K_A	Selection condition: definition	Define selection conditions for infotypes
V_T525L	Valuation model for employee data	Define valuation model
V_T525M_A	Assign selection rules to selection classes	Define selection class
V_T525O_A	Assign selection classes to valuation models	Define valuation model
V_T525P	Calculation process for employment period calculation	Define calculation process
V_T525Q	Calculation process for employment period calculation (customer)	Override attributes for calculation process
V_T525R	Process step for employment period calculation	Define process step
V_T525S	Assign valuation model and rounding rule	Assign valuation model and rounding rule to process step
V_T525Z	Permissibility of infotype selection for employment period calculation	Check permitted infotypes for selection rule

Retirement Pension Plan

This section contains information on

Betriebliche Altersversorgung (PA-PF-DE)

Einsatzmöglichkeiten

Die Komponente *Betriebliche Altersversorgung* (BAV*)* ermöglicht es, Versorgungsbezüge aus einer betrieblichen Altersversorgung im R/3-System zu erfassen, abzurechnen und zu kontieren.

Einführungshinweise

Hinweise zur Einführung der BAV finden Sie im Einführungsleitfaden *Betriebliche Altersversorgung.*

Funktionsumfang

Die Komponente *Betriebliche Altersversorgung* umfaßt:

Spezielle Infotypen zur BAV

- **Infotyp *Versorgungsordnung* (0323)**

  In diesem Infotyp ordnen Sie Ihren Mitarbeiter einer Versorgungsordnung zu. Jede Versorgungsordnung, die Sie im Customizing eingerichtet haben, bildet einen Subtyp des Infotyps *Versorgungsordnung* (0323). Jede Versorgungsordnung umfaßt eine Menge möglicher Ansprüche, die Ihnen abhängig von der gewählten Versorgungsordnung für den Mitarbeiter angezeigt werden.

- **Infotyp *Ansprüche* (0202)**

  Dort erfassen Sie Daten zu den Ansprüchen eines Mitarbeiters. Der Infotyp Ansprüche (0202) wird indirekt über den Infotyp *Versorgungsordnung* (0323) gepflegt.

- **Infotyp *Renten-/Bewertungsstatus* (0203)**

  Der Infotyp wird manuell von Ihnen angelegt und später durch den Report zur *Rentenermittlung* (RPCWSVD0) gepflegt. Der Infotyp enthält, analog zum Infotyp *Abrechnungsstatus* (0003), Daten zum Status des Mitarbeiters bezüglich der BAV.

- **Infotyp *Rentenbasisbezüge* (0201)**

  Der Infotyp enthält die Rentenbasisbezüge eines Mitarbeiters. Der Infotyp wird durch die *Rentenermittlung* (RPCWSCD0) gefüllt, kann aber auch manuell gepflegt werden. Rentenbasisbezüge, die als Lohnarten in diesem Infotyp stehen, fließen in die Abrechnung ein und werden an den Mitarbeiter ausgezahlt.

Reports

- **Reports zur Betrieblichen Altersversorgung**

  RPCWUBD0 (Übernahme Einkommen/Beiträge BAV)

  RPCWSVD0 (Rentenermittlung)

  RPCWIRD0 (Rentenanpassung)

Bescheinigungen:

RPBWDRD0 (Druckreport Bescheinigungen Betriebliche Altersversorgung)

RPBWDRD2 (Druckreport zyklische Anwartschaften Altersversorgung)

Beitragsrückerstattung:

RPLWDA5 (Anzeige Beitragsrückerstattung)

RPUWDAD5 (Bearbeiten Beitragsrückerstattung)

RPUWPRD0 (Liste der zu prüfenden Beitragsrückerstattungen)

RPUWDRD0 (Löschen Beitragsrückerstattungen)

RPCDTWD0 (Vorprogramm DTA Beitragsrückerstattungen)

- **Hilfsreports**

  RPUWETD0 (Anzeige BAV-Fehlermeldungen)

  RPUWELD0 (Löschen BAV-Fehlermeldungen)

  RPLWDAD0 (Anzeige BAV-Datenbanken)

  RPUWDAD0 (Pflege BAV-Datenbanken)

  RPLWDAD2 (Liste BAV-Daten)

  RPUWRSD0 (Ändern Renten-/Rückstellungsstatus (Infotyp 0203))

  RPUWSTD0 (Löschen Aktionen der Betrieblichen Altersversorgung)

  Alle Funktionen zur *Betrieblichen Altersversorgung* sind über den Menüpfad *Personalmanagement* → *Altersversorgung* → Betriebliche Altersversorgung erreichbar. Sie gelangen in ein Menü, das Ihnen Absprünge zu den einzelnen Funktionen bietet.

Ansprüche

Anhand von **Versorgungsordnungen**, **Ansprüchen** und **Leistungsarten** bilden Sie die Regelwerke Ihrer unternehmensspezifischen Altersversorgung ab.

Die **Versorgungsordnung** umfaßt eine Menge an **Ansprüchen**. Jeder Mitarbeiter ist über den Infotyp *Versorgungsordnung* (0323) einer Versorgungsordnung zugeordnet. Alle Ansprüche dieser Versorgungsordnung können dem Mitarbeiter zugesagt werden. Die **Leistungsart** wiederum ist die konkrete Ausprägung des Anspruchs, die sich aus dem Versicherungsverlauf ergibt.

Ein Anspruch auf Eigenrente umfaßt die Leistungsarten *Altersrente* und *Invalidenrente*. Geht der Mitarbeiter mit 65 Jahren in Altersrente, wird aus dem Anspruch *Eigenrente* die konkrete Leistungsart *Altersrente*. Bei vorzeitiger Invalidität wird aus dem Anspruch *Altersrente* die Leistungsart *Invalidenrente*.

Siehe auch:

Anspruchsverwaltung [Page 297]

Anspruch, Versorgungsordnung und Leistungsart [Page 300]

Versorgungseinrichtungen

Versorgungseinrichtungen sind Institutionen, die im Rahmen der *Betrieblichen Altersversorgung* bestimmte Funktionen übernehmen. Hierbei wird unterschieden zwischen der Funktion der **zuständigen Firma**, die einen Anspruch zugesagt hat und für dessen Erfüllung verantwortlich ist, und der Funktion des **Leistungsträgers**, der die Kosten der Versorgungsleistung trägt.

Siehe auch:

Versorgungseinrichtungen [Page 302]

Rentenermittlung und weitere Anspruchsbewertungen

Ansprüche, die einem Mitarbeiter zugesagt sind, können jederzeit bewertet werden. Hierzu steht der Report *Rentenermittlung* (RPCWSVD0) zur Verfügung.

Im Customizing können Sie pro Anspruch und Leistungsart ein Berechnungsverfahren für die Anspruchsbewertung hinterlegen. Die gängigsten Berechnungsverfahren sind in der SAP-Standardauslieferung bereits enthalten.

Im Versorgungsfall werden die bewerteten Ansprüche als Renten im Infotyp *Rentenbasisbezüge* (0201) für den Mitarbeiter gespeichert.

Siehe auch:

Anspruchsbewertung [Ext.]

Betriebswirtschaftliche Abläufe in der Betrieblichen Altersversorgung

Die gängigsten betriebswirtschaftlichen Abläufe (Pensionierung eines Mitarbeiters, Austritt eines Mitarbeiters mit Prüfung auf unverfallbare Anwartschaften etc.) sind in der BAV bereits durch entsprechende Prozesse unterstützt. Über eine Personalmaßnahme in den Stammdaten des Mitarbeiters (z.B. Maßnahme *Austritt/Pensionierung*) lösen Sie einen Verarbeitungsanlaß für die Rentenermittlung aus (z.B. Ermitteln der Altersrente). Anschließend zahlen Sie die Rente über die Personalabrechnung aus und erstellen eine entsprechende Bescheinigung über die Höhe der Altersrente für den Mitarbeiter.

Siehe auch:

Betriebswirtschaftlich Abläufe in der Betrieblichen Altersversorgung [Page 310]

Anspruchsverwaltung

Verwendung

Über die *Anspruchsverwaltung* nehmen Sie Mitarbeiter in eine Versorgungsordnung auf und sagen Ansprüche der Versorgungsordnung zu.

Funktionsumfang

Die Anspruchsverwaltung gliedert sich in ein personenunabhängiges *Regelwerk*, über das Versorgungsordnungen einer betrieblichen Altersversorgung abgebildet werden können und mitarbeiterindividuelle *Stammdaten*.

Regelwerk:

In dem Regelwerk bilden Sie die Versorgungsordnungen Ihrer betrieblichen Altersversorgung ab. Jede Versorgungsordnung besteht aus einer Menge an Ansprüchen. Jedem Anspruch weisen Sie ein Berechnungsverfahren (dienstzeitorientiert, beitragsorientiert, einkommensorientiert etc.) zu.

Zu jedem Anspruch definieren Sie Leistungsarten. Die Leistungsart bestimmt die konkrete Versorgungsleistung, die der Mitarbeiter bei Eintritt des Versorgungsfalles erhält.

Zusätzlich zu Versorgungsordnungen, Ansprüchen und Leistungsarten müssen Versorgungseinrichtungen definiert werden. Die Versorgungseinrichtung ist die konkrete Institution der Betrieblichen Altersversorgung (Pensionskasse, Unterstützungskasse etc.).

Die Abbildung des Regelwerks erfolgt im Einführungsleitfaden *Betriebliche Altersversorgung → Ansprüche.*

Siehe auch:

Anspruch, Versorgungsordnung und Leistungsart [Page 300]

Versorgungseinrichtung [Page 302]

Stammdaten

Über die Stammdaten der Anspruchsverwaltung erfolgt eine personenbezogene Zuordnung von Ansprüchen mit individuell abweichenden Informationen:

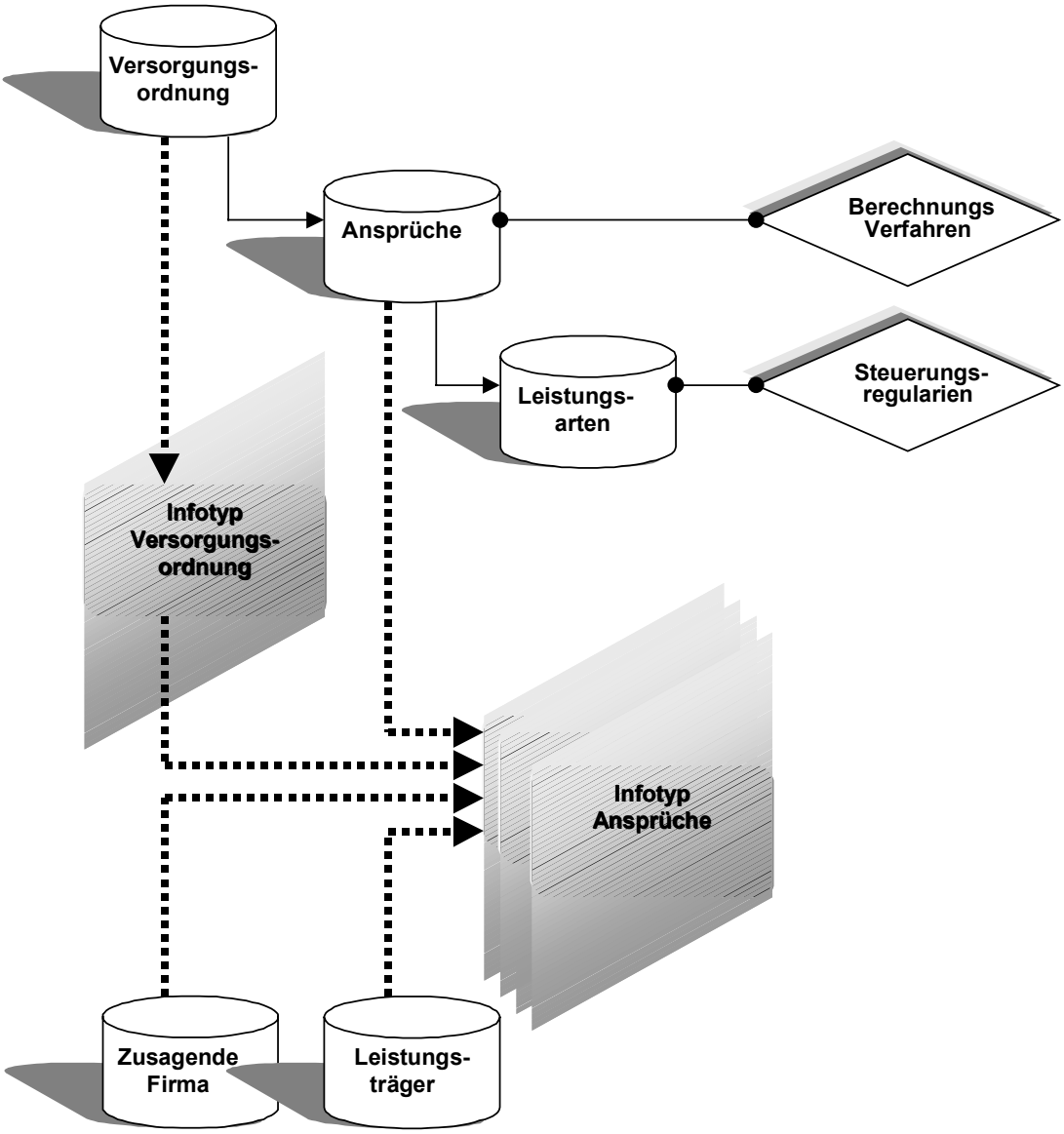
- **Infotyp *Versorgungsordnung* (0323)**
- **Infotyp *Ansprüche* (0202)**

  Über die Infotypen *Versorgungsordnung* (0323) und *Ansprüche* (0202) erfolgt fachlich gesehen die Aufnahme des Mitarbeiters in eine Versorgungsordnung und die Zusage von Ansprüchen der Versorgungsordnung.
- **Infotyp *Renten-/Bewertungsstatus* (0203)**

Siehe auch:

Stammdaten [Page 304]

Schematisches Datemodell der Anspruchsverwaltung



Anspruch, Versorgungsordnung und Leistungsart

Definition

Ein Anspruch stellt eine zu erwartende, zukünftige Leistung aus einer betrieblichen Versorgungseinrichtung dar.

Der Anspruch als wichtigstes Schlüsselkriterium der betrieblichen Altersversorgung steuert, mit welchem Berechnungsverfahren die Bewertung durchzuführen ist und welche Steuerungsinformationen dafür zu verwenden sind.

Ansprüche können einem Mitarbeiter direkt zugesagt werden und werden im Leistungsfall als eine oder mehrere *Leistungsarten* des Anspruchs berechnet.

Ansprüche werden in *Versorgungsordnungen* zusammengefaßt.

- **Versorgungsordnung:**

  Eine Versorgungsordnung umfaßt die Menge an potentiellen Versorgungsleistungen, aus der einem Mitarbeiter Ansprüche zugesagt werden können.

- **Anspruch:**

  Anspruch auf eine Leistung gegenüber einer betrieblichen Versorgungseinrichtung, der einem Mitarbeiter direkt zugeordnet werden kann.

- **Leistungsart:**

  Eine Leistungsart bestimmt die konkrete Leistung, die sich aus einem Anspruch gegenüber einer betrieblichen Versorgungseinrichtung ableiten läßt. Zum Beispiel kann ein Anspruch auf Rentenleistung im Fall der Invalidität die Leistungsart *Invalidenrente* auslösen. Derselbe Anspruch kann aber im Falle einer regulären Pensionierung zur Leistungsart *Altersrente* führen. Leistungsarten können einem Mitarbeiter nicht direkt zugesagt werden sondern ergeben sich situationsbedingt über ein Regelwerk aus einem Anspruch. Aus einem Anspruch können dabei unter Umständen mehrere Leistungsarten entstehen.

Struktur

Zu einer *Versorgungsordnung* gehören eine Menge an *Ansprüchen*. Ist der Mitarbeiter der Versorgungsordnung zugeordnet, so können ihm aus dieser Menge an Ansprüchen einzelne oder mehrere Ansprüche direkt zugesagt werden.

Leistungsarten dagegen sind einem Anspruch zugeordnet. Eine Leistungsart kann einem Mitarbeiter nur zugeordnet werden, wenn auch der übergeordnete Anspruch dem Mitarbeiter zugeordnet ist.

Ein Mitarbeiter ist der Versorgungsordnung *Altersversorgung* zugewiesen. Aus dieser Versorgungsordnung ist ihm der Anspruch auf eine Altersrente zugesagt.

Dem Anspruch auf Altersrente ist als mögliche Leistungsart eine Invalidenrente zugeordnet. Im Falle der Invalidität soll der Mitarbeiter statt der Altersrente eine Invalidenrente erhalten. Diese Zusage ist nur möglich, wenn auch der Anspruch auf Altersrente zugesagt ist.

Verwendung

Verwenden Sie:	Ziel:
Versorgungsordnungen:	Um eine Menge an Ansprüchen zusammenzufassen. Über die Gestaltung von Versorgungsordnungen können Sie Ihre betriebliche Altersversorgung abbilden.
Ansprüche:	Um die Versorgungsleistungen einer Versorgungsordnung festzulegen, die Sie einem Mitarbeiter direkt zusagen möchten.
Leistungsarten:	Um die konkreten Versorgungsleistungen festzulegen, die ein Mitarbeiter bei Eintritt einer bestimmten Situation in Abhängigkeit des zugesagten Anspruchs erhalten soll.

Versorgungseinrichtung

Definition

Versorgungseinrichtungen sind Institutionen, die im Rahmen der betrieblichen Altersversorgung bestimmte Funktionen übernehmen.

Versorgungseinrichtungen können nach Art ihrer Funktion unterschieden werden in *zuständige Firma* und *Leistungsträger*.

- **Zuständige Firma**

  Die Versorgungseinrichtung, die den Anspruch auf die Versorgungsleistung ursprünglich zugesagt oder die Zuständigkeit dafür übernommen hat.

- **Leistungsträger**

  Die Versorgungseinrichtung, die die Kosten der Leistung trägt.

Struktur

Die Versorgungseinrichtung als Oberbegriff unterteilt sich, je nach Funktion, in *zuständige Firma* und *Leistungsträger*. Im Normalfall werden die Funktionen der *zuständigen Firma* und des *Leistungsträgers* von einer Versorgungseinrichtung wahrgenommen.

In Ausnahmefällen können zusagende Firma und Leistungsträger verschiedene Versorgungseinrichtungen sein:

Herr Schmidt ist bei der Muster AG angestellt. Die Muster AG hat Herrn Schmidt im Rahmen der betrieblichen Altersversorgung eine Altersrente zugesagt und verwaltet Herrn Schmidts Ansprüche.

Die Zahlung der Altersrente wird aber nicht von der Muster AG direkt, sondern über eine Pensionskasse, die Pensionskasse Muster, abgewickelt.

In diesem Beispiel fungiert die Muster AG als *zuständige Firma* und die Pensionskasse *Muster* als *Leistungsträger.*

Falls sich zuständige Firma und Leistungsträger voneinander unterscheiden, kann in bestimmten Situationen die zuständige Firma als Leistungsträger einspringen:

Herr Schmidt hat einen Anspruch auf eine Altersrente. Im Falle der Invalidität erhält er als Leistungsart die *Invalidenrente*.

Zuständige Firma für Herrn Schmidt ist die *Muster AG*, Leistungsträger *die Muster Pensionskasse*. Für den Fall der Invalidität übernimmt jedoch die *Muster AG* das Risiko und springt als Leistungsträger ein.

Verwendung

Verwenden Sie:	Ziel:
zuständige Firma:	Um diejenigen Versorgungseinrichtungen zu kennzeichnen, die die Ansprüche zusagen und die zugesagten Ansprüche verwalten.
Leistungsträger:	Um diejenigen Versorgungseinrichtungen zu kennzeichnen, die die Versorgungsleistung tatsächlich erbringen. Dem Leistungsträger werden im Abrechnungslauf die tatsächlichen Kontierungsmerkmale (Buchungskreis, Kostenrechnungskreis, Geschäftsbereich, Kostenstelle) zugeordnet.

Stammdaten

Für die Anspruchsverwaltung erfolgt die Stammdatenpflege in den folgenden Infotypen:

- Infotyp *Versorgungsordnung* (0323)
- Infotyp *Ansprüche* (0202)

1. Infotyp Versorgungsordnung (0323)

In einem ersten Schritt wird für einen Mitarbeiter der Infotyp Versorgungsordnung (0323) gepflegt. Durch diesen Infotyp wird ein Mitarbeiter einer Versorgungsordnung zugeordnet. Gleichzeitig werden dem Mitarbeiter gültige Ansprüche dieser Versorgungsordnung zugeordnet.

2. Infotyp Ansprüche (0202)

Nachdem ein Mitarbeiter einer Versorgungsordnung zugeordnet worden ist, können im Infotyp *Ansprüche* (0202) Ansprüche dieser Versorgungsordnung zugesagt werden. Dies geschieht durch direkten Ansprung aus dem Infotyp *Versorgungsordnung* (0323).

Weiterhin legt der Infotyp neben dem Anspruch die zusagende Firma und den Leistungsträger fest.

Je nach Definition des Anspruchs können in dem Infotyp bestimmte von dem Regelwerk des Anspruchs abweichende Informationen individuell abgelegt werden. Beispiele hierfür sind Mitgliedsdaten für Pensionskassen oder die Spezifikation von Rentenfestzusagen.

Ohne die Zuordnung eines Anspruchs im Infotyp *Ansprüche* (0202) kann für einen Mitarbeiter keine Rente ermittelt werden.

Infotyp Renten-/Bewertungsstatus (0203)

Dieser Infotyp wird zur Speicherung von Statusinformationen im Rahmen der betrieblichen Altersversorgung verwendet.

Mitarbeiter können individuell von einzelnen Funktionen ausgeschlossen oder zugelassen werden:

- Sperre maschinelle Anspruchsbewertung
- Sperre der Rentenanpassung
- Sperre Übernahme Basisdaten

Der Infotyp *Renten-/Bewertungsstatus* (0203) muß für jeden Mitarbeiter angelegt werden. Das Vorhandensein des Infotyps ist Voraussetzung für die Übernahme von Daten in die BAV-Datenbank, die Rentenermittlung, die Rentenanpassung und die Beitragsrückerstattung.

Versorgungsordnung (Infotyp 0323)

Definition

Über den Infotyp *Versorgungsordnung* (0323) nehmen Sie Ihre Mitarbeiter in eine Versorgungsordnung auf.

Struktur

Der Infotyp *Versorgungsordnung* (0323) unterteilt sich in einzelne Versorgungsordnungen. Jede Versorgungsordnung bildet einen eigenen Subtyp.

Die einzelnen Versorgungsordnungen werden im Customizing eingerichtet.

Versorgungsordnung BAV

Im Feld *Versorgungsordnung* nehmen Sie den Mitarbeiter in eine bestimmte Versorgungsordnung auf. Die Aufnahme in eine Versorgungsordnung legt fest, welche möglichen Ansprüche einem Mitarbeiter überhaupt zugesagt werden können.

Mögliche Ansprüche

In den Feldern *Mögliche Ansprüche* werden alle Ansprüche angezeigt, die dem Mitarbeiter laut Versorgungsordnung zugesagt werden können.

Mit der Funktion *Anlegen* kann der einzelne Anspruch dem Mitarbeiter zugesagt werden. Über die Funktion Anlegen wird hierfür in den Infotyp *Ansprüche* (0202) verzweigt. Dort werden alle relevanten Daten zum Anspruch gepflegt.

Jeder Anspruch ist mit einem Kennzeichen *Existenz* versehen:

- Für mögliche Ansprüche laut Versorgungsordnung, die dem Mitarbeiter aber nicht zugesagt sind, enthält das Kennzeichen *Existenz* eine rote Ampel. Für diese Ansprüche ist der Infotyp *Ansprüche* (0202) noch nicht gepflegt.
- Für Ansprüche, die dem Mitarbeiter bereits zugesagt sind, enthält das Kennzeichen *Existenz* eine grüne Ampel. Für diese Ansprüche ist der Infotyp *Ansprüche* (0202) bereits entsprechend gepflegt.

  Über die Funktion *Ändern* können die Angaben zu dem Anspruch im Infotyp *Ansprüche* (0202) geändert werden.

  Die Funktion *Löschen* löscht einen bereits angelegten Anspruch im Infotyp *Ansprüche* (0202). Wird ein bereits existierender Anspruch gelöscht, bleibt er dennoch weiterhin als *möglicher Anspruch* im Infotyp *Versorgungsordnung* (0323) bestehen. Gelöscht wird lediglich der zugehörige Datensatz im Infotyp *Ansprüche* (0202).

Ansprüche (Infotyp 0202)

Definition

Über den Infotyp *Ansprüche* (0202) sagen Sie einem Mitarbeiter den Anspruch auf eine Versorgungsleistung zu. Der Infotyp *Ansprüche* (0202) wird in der Regel nicht direkt gepflegt, die Pflege erfolgt über einen Ansprung aus dem Infotyp *Versorgungsordnung* (0323). Es können nur Ansprüche zugesagt werden, die laut der Versorgungsordnung des Mitarbeiters aus Infotyp Versorgungsordnung (0323) zulässig sind.

Der Infotyp Ansprüche (0202) wird bei der Rentenermittlung mit dem Report *RPCWVSD0* (Rentenermittlung) verarbeitet.

Struktur

Der Infotyp *Ansprüche* (0202) unterteilt sich in einzelne Ansprüche. Jeder Anspruch bildet einen eigenen Subtyp.

Die einzelnen Ansprüche werden im Customizing eingerichtet.

Ansprüche

Hier erfassen Sie zu jedem Anspruch die *zuständige Firma*, den *Leistungsträger*, mögliche *Änderungsgründe* und die *Währung*.

Anspruchssteuerung

Hier erfassen Sie Angaben zur Bewertung des Anspruchs und zu Auswertungszwecken.

Die möglichen Eingabefelder hängen vom jeweiligen Anspruch ab. Im Customizing wird jedem Anspruch eine eigene Bildgruppe mit unterschiedlichen Eingabefeldern zugeordnet. Folgende Bildgruppen werden im Standard ausgeliefert:

- Festzusagen
- Firmenrenten
- Gehaltsverzicht
- Kassenbild (Pensionskassenverfahren)

Kollisionen

Über die Funktion *Kollisionen* erhalten Sie eine Übersicht aller Ansprüche eines Mitarbeiters, die sich zeitlich überschneiden.

Leistungsarten

Über die Funktion *Leistungsarten* erhalten Sie eine Übersicht aller möglichen Leistungsarten zum Anspruch.

Daten zur Fristenprüfung

Über die Funktion *Daten zur Fristenprüfung* können Sie eine Wartezeitprüfung bzw. eine UA-Prüfung durchführen. Mit der Funktion können Sie auf einfache Weise bei Nachfrage eines Mitarbeiters überprüfen, ob z.B. eine unverfallbare Anwartschaft vorliegt.

Renten-/Bewertungsstatus (Infotyp 0203)

Im Infotyp *Renten-/Bewertungsstatus* (0203) werden Daten zur Bewertung von Renten hinterlegt.

Der Infotyp muß zunächst manuell für jeden Mitarbeiter angelegt werden. Das Vorhandensein des Infotyps ist Voraussetzung beim Start der Reports *RPCWUBD0* (Übernahme von Daten in die BAV-Datenbank), *RPCWVSD0* (Rentenermittlung), *RPCWIRD0* (Rentenanpassung Betriebliche Altersversorgung) und *RPCDTWD0* (Vorprogramm DTA Beitragsrückerstattungen).

Siehe auch:

Übernahme von Daten in die BAV-Datenbank (PRCWUBD0) [Page 334]

Rentenermittlung (RPCWVSD0) [Page 340]

Nachdem der Infotyp einmal angelegt ist, erfolgt eine Aktualisierung des Infotyps durch den Report RPCWVSD0 (Rentenermittlung). Eine manuelle Pflege erfolgt nur in Ausnahmefällen.

Renten-/Bewertungsstatus BAV

Über das Feld *Sperre Bewertung* können Sie diesen Mitarbeiter von der Rentenermittlung mit dem Report *RPCWSVD0* (Rentenermittlung) ausschließen. Ist das Kennzeichen markiert, wird der Mitarbeiter nicht mehr selektiert.

Rentenanpassung

Über das Feld *Sperre* können Sie Mitarbeiter von der Rentenanpassung mit dem Report *RPCWIRD0* (Rentenanpassung Betriebliche Altersversorgung) ausschließen. Ist das Feld markiert, wird der Mitarbeiter nicht selektiert.

Das Feld *Rentenanpassung* enthält das Datum der letzten Rentenanpassung. Es wird durch den Report *RPCWIRD0* (Rentenanpassung Betriebliche Altersversorgung) gepflegt.

Übernahme Basisdaten

Über das Feld *Sperre* können Sie Daten dieses Mitarbeiters von der Übernahme in die BAV-Datenbank ausschließen. Ist das Feld markiert, wird der Mitarbeiter von dem Report *RPCWUBD0* (Übernahme von Daten in die BAV-Datenbank) nicht selektiert.

Die Felder *Übernahme Basis ab* zeigen, für welchen Zeitraum bereits Daten in die BAV-Datenbank übernommen wurden.

Beitragsrückerstattungen

Das Feld *letzte Beitragsrückerstattung* zeigt an, wann letztmals eine Beitragsrückerstattung an den Mitarbeiter erfolgt ist. Das Feld wird von dem Report *RPCDTWD0* (Vorprogramm DTA Beitragsrückerstattungen) gepflegt.

Über das Feld *zu prüfen* kann die Beitragsrückerstattung für einen Mitarbeiter unterbunden werden. Ist das Kennzeichen markiert, werden die Beitragsrückerstattungen des Mitarbeiters von dem Report *RPCDTWD0* (Vorprogramm DTA Beitragsrückerstattungen) nicht selektiert. Statt dessen kann für alle Beitragsrückerstattungen, die mit diesem Kennzeichen markiert sind, eine

Liste erzeugt werden. Hierzu steht der Report *RPUWPRD0* (Liste der zu prüfenden Beitragsrückerstattungen) zur Verfügung.

Geschäftsfälle in der Betrieblichen Altersversorgung

In der Standardauslieferung der BAV sind die wichtigsten Geschäftsfälle bereits als Prozesse eingerichtet. Ausgangspunkt ist dabei stets ein Ereignis im Leben eines Mitarbeiters (Pensionierung, Austritt, Tod etc.). Diese Ereignisse werden in den Stammdaten über entsprechende Personalmaßnahmen und Maßnahmengründe abgebildet. Den jeweiligen Personalmaßnahmen/Maßnahmengründen wiederum entsprechen Verarbeitungstypen und Verarbeitungsanlässe [Page 343] in der Rentenermittlung. Nachdem die Personalmaßnahme durchgeführt ist, wird die *Rentenermittlung* (RPCWVSD0) gestartet. Beim Start der Rentenermittlung geben Sie einen Verarbeitungsanlaß vor. Die Rentenermittlung überprüft, ob bei den selektierten Mitarbeitern eine entsprechende Personalmaßnahme vorliegt und löst den entsprechenden Verarbeitungsanlaß aus.

Sie führen die Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Pensionierung* durch. Der Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Pensionierung* ist der Verarbeitungstyp *Eigenrente* mit dem Verarbeitungsanlaß *Altersrente* zugeordnet. Sie starten die Rentenermittlung mit dem Verarbeitungstyp *Eigenrente*. Der Report erkennt anhand der Maßnahme *Vorruhestand/Pensionierung*, Maßnahmengrund *Pensionierung*, das eine reguläre Altersrente ermittelt werden muß und löst für den Mitarbeiter den Verarbeitungsanlaß *Altersrente* aus. Gemäß den Ansprüchen des Mitarbeiters aus dem Infotyp Ansprüche und den im Customizing definierten Regeln und Berechnungsverfahren wird die Rente ermittelt.

Die nachfolgend genannten Geschäftsfälle sind als Prozesse definiert:

- Altersrente
- Vorgezogene Altersrente
- Austritt mit Prüfung auf unverfallbare Anwartschaften
- Wiedereintritt als Firmenrentner mit unverfallbarer Anwartschaft
- Hinterbliebenenrente
- Invalidenrente
- Simulationen

Voraussetzungen

Folgende Voraussetzungen müssen erfüllt sein, damit Sie die genannten Geschäftsfälle für Ihre Mitarbeiter durchführen können.

Customizing

Sie haben im Einführungsleitfaden (IMG) der *Betriebliche Altersversorgung* die entsprechenden Einstellungen gemäß Ihrer Versorgungsordnung durchgeführt. Spezielle Einstellungen im IMG, die Voraussetzung für einen bestimmten Geschäftsfall sind, sind in dem jeweiligen Geschäftsfall beschrieben.

Stammdaten

Sie haben folgende Infotypen gepflegt:

Geschäftsfälle in der Betrieblichen Altersversorgung

- *Versorgungsordnung BAV* (Infotyp 0323)
  Der Mitarbeiter ist einer Versorgungsordnung zugeordnet.
- *Ansprüche BAV* (Infotyp 0202)
  Dem Mitarbeiter sind die für den jeweiligen Geschäftsfall relevanten Ansprüche und Leistungsarten zugesagt.
- *Renten-/Bewertungsstatus BAV* (Infotyp 0203)

Übernahme von Daten in die BAV-Datenbank

Für Ansprüche mit Berechnungsverfahren, die auf Beiträgen oder Einkommen basieren, müssen vor der Rentenermittlung die relevanten Beiträge und Einkommen aus der Abrechnung in die BAV-Datenbank übernommen werden, damit diese Daten für die nachfolgende Prozesse in der Rentenermittlung zur Verfügung stehen. Falls Ihre Betriebliche Altersversorgung nicht auf Beiträgen und Einkommen basiert, müssen Sie dementsprechend auch keine Datenübernahme durchführen.

Siehe auch:

Übernahme von Daten in die BAV-Datenbank (RPCWUBD0) [Page 334]

Altersrente

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses pensionieren Sie einen aktiven Mitarbeiter, der das Endalter laut Versorgungsordnung erreicht hat (in der Regel 65 Jahre). Sie ermitteln seine Altersrente, die er aufgrund seiner Mitgliedschaft in Ihrer Betrieblichen Altersversorgung erhält. Anschließend erstellen Sie für den Mitarbeiter eine entsprechende Bescheinigung über die Höhe der Altersrente.

Voraussetzungen

Customizing

Leistungsarten und Ansprüche

- Sie haben entweder für den gesamten Anspruch auf *Eigenrente* oder speziell für die Leistungsart *Altersrente* eine Lohnart definiert, mit der die Rente ausgezahlt wird. Weitere Informationen hierzu finden Sie im Einführungsleitfaden (IMG) der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Ansprüche anlegen* → Ansprüche definieren [Ext.] bzw. unter *Leistungsarten* → Leistungsarten einrichten [Ext.].
- Sie haben als eine mögliche Leistungsart zum Anspruch auf Eigenrente die Leistungsart *Altersrente* hinterlegt. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* → Leistungsarten zum Anspruch zuordnen [Ext.].

Rentenermittlung

- Sie haben festgelegt, daß die Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Pensionierung* in der Rentenermittlung den Verarbeitungstyp *Eigenrente* mit dem Verarbeitungsanlaß *Altersrente* auslöst. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Zuordnung Maßnahme/-gründe zum Verarbeitungsanlaß [Ext.].
- Sie haben pro Anspruch festgelegt, welche Fristenprüfungen (Wartezeit, Unverfallbarkeit, Altersgrenze) in der Rentenermittlung durchlaufen werden müssen. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Fristenprüfungen* in den Kapiteln Wartezeit [Ext.], Unverfallbarkeit [Ext.] und Altersgrenze [Ext.].
- Sie haben für den Verarbeitungstyp *Eigenrente* und den Verarbeitungsanlaß *Altersrente* festgelegt, wie sich die Rentenermittlung - je nach Ergebnis der Fristenprüfungen - verhalten soll:
  - Wenn die Fristenprüfungen nicht erfolgreich verlaufen, soll die Rentenermittlung überprüfen, ob eine Beitragsrückerstattung erfolgen muß, und die Beitragsrückerstattung ggf. durchführen.
  - Wenn die Fristenprüfungen erfolgreich verlaufen, sollen die Ansprüche bewertet, eine entsprechende Bescheinigung erstellt und die ermittelte Rente zur Auszahlung bereit gestellt werden.

  Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.]

- Sie haben ein Berechnungsverfahren eingerichtet, nach dem aus dem Anspruch bei erfolgreicher Fristenprüfung eine Altersrente ermittelt wird. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Berechnungsverfahren.*

Ablauf

1. Sie führen die Personalmaßnahme *Vorruhestand/Pensionierung*, Maßnahmengrund *Pensionierung* durch. Beginndatum der Maßnahme ist das Pensionierungsdatum des Mitarbeiters.
2. Sie starten die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Eigenrente.*
3. Die Rentenermittlung liest den Infotyp *Maßnahmen* (0000) und erkennt, daß die Maßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Pensionierung* durchgeführt wurde. Dementsprechend wird der Verarbeitungstyp *Eigenrente*, Verarbeitungsanlaß *Altersrente* ausgelöst.
4. Die Rentenermittlung liest die Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) und führt pro Anspruch die im Customizing hinterlegten Fristenprüfungen durch.
5. Für die Ansprüche, die die Fristenprüfungen **nicht** erfolgreich durchlaufen, führt die Rentenermittlung ggf. eine Beitragsrückerstattung [Page 321] durch.
6. Für die Ansprüche, die die Fristenprüfungen erfolgreich durchlaufen, führt der Report eine Rentenermittlung gemäß dem Berechnungsverfahren des Anspruchs durch. Das Ergebnis dieser Rentenermittlung wird pro Anspruch in einer Lohnart abgestellt.
7. Die Rentenermittlung speichert die Lohnarten im Infotyp *Rentenbasisbezüge* (0201).
8. Sie starten das Bescheinigungswesen und erstellen für den Mitarbeiter eine Bescheinigung über die Höhe seiner Altersrente.

Ergebnis

Sie haben für einen pensionierten Mitarbeiter die Altersrente aus der Betrieblichen Altersversorgung ermittelt und als Lohnart im Infotyp *Rentenbasisbezüge* (0201) gespeichert. Damit steht die Altersrente zur Auszahlung durch die Personalabrechnung bereit.

Sie haben dem Mitarbeiter eine Bescheinigung über die Höhe seiner Altersrente ausgestellt.

Vorgezogene Altersrente

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses pensionieren Sie einen aktiven Mitarbeiter, der das vorgezogene Endalter laut Versorgungsordnung erreicht hat. Sie ermitteln seine Altersrente, die er aufgrund seiner Mitgliedschaft in Ihrer Betrieblichen Altersversorgung erhält. Da der Mitarbeiter vor dem regulären Endalter laut Versorgungsordnung (in der Regel 65 Jahre) in Rente geht, muß er in der Regel einen Abschlag in Kauf nehmen. Dieser Abschlag wird in der Rentenermittlung bei vorgezogener Altersrente automatisch berechnet.

Voraussetzungen

Customizing

Leistungsarten und Ansprüche

- Sie haben entweder für den gesamten Anspruch auf *Eigenrente* oder speziell für die Leistungsart *vorgezogene Altersrente* eine Lohnart definiert, mit der die Rente ausgezahlt wird.
  Weitere Informationen finden Sie im Einführungsleitfaden (IMG) der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Ansprüche anlegen* → Ansprüche definieren [Ext.] bzw. unter *Leistungsarten* → Leistungsarten einrichten [Ext.].
- Sie haben als eine mögliche Leistungsart zum Anspruch auf Eigenrente die Leistungsart *vorgezogene Altersrente* hinterlegt. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* -> Leistungsarten zum Anspruch zuordnen [Ext.].

Rentenermittlung

- Sie haben festgelegt, daß die Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Vorruhestand* in der Rentenermittlung den Verarbeitungstyp *Eigenrente* mit dem Verarbeitungsanlaß *vorgezogene Altersrente* auslöst. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Zuordnung Maßnahme/-gründe zum Verarbeitungsanlaß [Ext.].
- Sie haben Regeln festgelegt, nach denen die Fristenprüfungen (Wartezeit, Unverfallbarkeit, Altersgrenze) ablaufen. Bei der Fristenprüfung auf die Altersgrenze haben Sie ein vorgezogenes Endalter (z.B. 55 Jahre) angegeben, auf das bei vorgezogener Altersrente geprüft werden kann. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Fristenprüfungen* → in den Kapiteln Wartezeit [Ext.], Unverfallbarkeit [Ext.] und Altersgrenze [Ext.]
- Sie haben für den Verarbeitungstyp *Eigenrente* und den Verarbeitungsanlaß *vorgezogene Altersrente* festgelegt, wie sich die Rentenermittlung - je nach Ergebnis der Fristenprüfungen - verhalten soll:
  - Wenn die Fristenprüfungen nicht erfolgreich verlaufen, soll die Rentenermittlung überprüfen, ob eine Beitragsrückerstattung erfolgen muß, und die Beitragsrückerstattung ggf. durchführen.

- Wenn die Fristenprüfungen erfolgreich verlaufen, sollen die Ansprüche bewertet, eine entsprechende Bescheinigung erstellt und die ermittelte Rente zur Auszahlung bereit gestellt werden.

Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.]

- Sie haben pro Leistungsart festgelegt, welche Abschläge bei vorgezogener Altersrente erfolgen sollen (z. B. 0,3% Abschlag für jeden Monat, den der Mitarbeiter vor dem regulären Endalter in Rente geht). Weitere Informationen finden Sie im IMG der Betrieblichen Altersversorgung unter *Ansprüche* → *Abschläge*/*Zuschläge* → *Definition Regelungen für Ab-/Zuschläge* bzw. *Zuordnung Regelung für Zu-/Abschläge zur Leistungsart*
- Sie haben ein Berechnungsverfahren eingerichtet, nach dem aus dem Anspruch bei erfolgreicher Fristenprüfung eine Altersrente ermittelt wird. Weitere Informationen hierzu finden Sie im IMG der Betrieblichen Altersversorgung unter *Steuerung Berechnungsverfahren.*

Ablauf

9. Sie führen die Personalmaßnahme *Vorruhestand/Pensionierung*, Maßnahmengrund *Vorruhestand* durch. Beginndatum der Maßnahme ist das Pensionierungsdatum des Mitarbeiters.
10. Sie starten die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Eigenrente.*
11. Die Rentenermittlung liest den Infotyp *Maßnahmen* (0000) und erkennt, daß die Maßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Vorruhestand* durchgeführt wurde. Dementsprechend wird der Verarbeitungstyp *Eigenrente*, Verarbeitungsanlaß *vorgezogene Altersrente* ausgelöst.
12. Die Rentenermittlung liest die Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) und führt die im Customizing hinterlegten Fristenprüfungen durch.
13. Für die Ansprüche, die die Fristenprüfung **nicht** erfolgreich durchlaufen, führt die Rentenermittlung ggf. eine Beitragsrückerstattung [Page 321] durch.
14. Für die Ansprüche, die die Fristenprüfungen erfolgreich durchlaufen, führt der Report eine Rentenermittlung gemäß dem Berechnungsverfahren des Anspruchs durch. Falls im Customizing vorgegeben, werden Abschläge für die vorzeitige Inanspruchnahme der Altersrente automatisch berechnet. Das Ergebnis dieser Rentenermittlung wird pro Anspruch in einer Lohnart abgestellt.
15. Die Rentenermittlung speichert die Lohnarten im Infotyp *Rentenbasisbezüge* (0201).
16. Sie starten das Bescheinigungswesen und erstellen für den Mitarbeiter eine Bescheinigung über die Höhe seiner vorgezogenen Altersrente.

Ergebnis

Sie haben für einen pensionierten Mitarbeiter im vorzeitigen Ruhestand die vorgezogene Altersrente aus der Betrieblichen Altersversorgung ermittelt und als Lohnart im Infotyp *Rentenbasisbezüge* (0201) gespeichert. Damit steht die vorgezogene Altersrente zur Auszahlung durch die Personalabrechnung bereit.

Sie haben dem Mitarbeiter eine Bescheinigung über die Höhe seiner vorgezogenen Altersrente ausgestellt.

Austritt mit Prüfung auf unverfallbare Anwartschaften

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses lassen Sie einen Mitarbeiter vor Erreichen des Rentenalters aus Ihrem Unternehmen austreten und überprüfen, ob und in welcher Höhe eine unverfallbare Anwartschaft auf eine spätere Rente besteht.

Unverfallbare Anwartschaft

Falls eine unverfallbare Anwartschaft besteht, wird die Höhe der unverfallbare Anwartschaft in der BAV-Datenbank abgespeichert. Die gesetzliche vorgeschriebene Zuwachsermittlung (bis Alter 65) wird entsprechend berücksichtigt. Die unverfallbare Anwartschaft hat - bis zum Eintritt des Versorgungsfalls - lediglich vorläufigen Charakter und wird nur für die Überleitung zur Versicherungsmathematik und zur Erstellung der Bescheinigung über die Höhe der unverfallbaren Anwartschaft verwendet. Wenn der Versorgungsfall beim Mitarbeiter eintritt, wird die tatsächliche Rente mit den dann bekannten, aktuellen Werten (Pensionierungsdatum, etc.) komplett neu berechnet.

Beitragsrückerstattung

Falls keine unverfallbare Anwartschaft besteht, der Mitarbeiter aber Arbeitnehmerbeiträge in die Betriebliche Altersversorgung eingezahlt hat, müssen diese Beiträge zurückerstattet sowie auf die Beiträge angefallenen Zinsen versteuert werden. Hierzu wird automatisch eine Beitragsrückerstattung angestoßen.

Voraussetzungen

Customizing

Leistungsarten und Ansprüche

- Sie haben entweder für den gesamten Anspruch auf *Eigenrente* oder speziell für die Leistungsart *Altersrente* eine Lohnart definiert, mit der die Rente ausgezahlt bzw. als unverfallbare Anwartschaft in der BAV-Datenbank abgespeichert wird. Weitere Informationen finden Sie im Einführungsleitfaden (IMG) der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Ansprüche anlegen* → Ansprüche definieren [Ext.] bzw. unter *Leistungsarten* → Leistungsarten einrichten [Ext.].
- Sie haben als eine mögliche Leistungsart zum Anspruch auf Eigenrente die Leistungsart *Altersrente* hinterlegt. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* → Leistungsarten zum Anspruch zuordnen [Ext.].

Rentenermittlung

- Sie haben festgelegt, daß die Personalmaßnahme *Austritt* mit den relevanten Maßnahmengründen in der Rentenermittlung den Verarbeitungstyp *Austritt mit UA-Prüfung* mit dem Verarbeitungsanlaß *Austritt mit UA-Prüfung* auslöst. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Zuordnung Maßnahme/-gründe zum Verarbeitungsanlaß [Ext.]
- Sie haben pro Anspruch festgelegt, welche Fristenprüfungen zur Unverfallbarkeit des Anspruchs erfolgreich durchlaufen werden müssen.
  Des weiteren haben Sie festgelegt, daß bei Unverfallbarkeit eines Anspruchs der

entsprechende Satz des Infotyps *Ansprüche BAV* (0202) zum Zeitpunkt des Austritts abgegrenzt wird: Die Ansprüche bis zum Zeitpunkt des Austritts behalten den Anspruchsstatus `1` (effektiver Anspruch), die Ansprüche ab dem Austritt erhalten den Status `3` (Status nach UA).
Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Fristenprüfungen* → Unverfallbarkeit [Ext.]

- Sie haben für den Verarbeitungstyp Eigenrente und den Verarbeitungsanlaß vorgezogene Altersrente festgelegt, wie sich die Rentenermittlung - je nach Ergebnis der Fristenprüfungen - verhalten soll:
  - Wenn die Fristenprüfungen nicht erfolgreich verlaufen, soll die Rentenermittlung überprüfen, ob eine Beitragsrückerstattung erfolgen muß, und die Beitragsrückerstattung ggf. durchführen
  - Wenn die Fristenprüfungen erfolgreich verlaufen, sollen die Ansprüche bewertet, eine entsprechende Bescheinigung erstellt und die ermittelte Rente als unverfallbare Anwartschaft in der BAV-Datenbank gespeichert werden.

  Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.]
- Sie haben ein Berechnungsverfahren eingerichtet, nach dem aus dem Anspruch bei erfolgreicher Fristenprüfung die Höhe der späteren Altersrente als unverfallbare Anwartschaft ermittelt wird. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Berechnungsverfahren.*
- Sie haben zu jedem Berechnungsverfahren festgelegt, wie die gesetzlich vorgeschriebene Zuwachsermittlung erfolgen soll. Weitere Informationen hierzu finden Sie im IMG der Betrieblichen Altersversorgung unter Steuerung *Berechnungsverfahren* → *<Berechnungsverfahren>* → *Hochrechnung von Ansprüchen in die Zukunft.*

Ablauf

17. Sie führen die Personalmaßnahme *Austritt* mit dem entsprechenden Maßnahmengrund durch. Beginndatum der Maßnahme ist das Austrittsdatum des Mitarbeiters.
18. Sie starten für den Mitarbeiter die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Austritt mit UA-Prüfung.*
19. Die Rentenermittlung liest den Infotyp *Maßnahmen* (0000) und erkennt, daß die Maßnahme *Austritt* durchgeführt wurde. Dementsprechend wird der Verarbeitungstyp *Austritt mit UA-Prüfung*, Verarbeitungsanlaß *Austritt mit UA-Prüfung* ausgelöst.
20. Die Rentenermittlung liest die Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) und führt pro Anspruch die im Customizing hinterlegte Fristenprüfung zur Unverfallbarkeit durch.
21. Für die Ansprüche, die die Fristenprüfung **nicht** erfolgreich durchlaufen, führt die Rentenermittlung ggf. eine Beitragsrückerstattung [Page 321] durch.
22. Für die Ansprüche, die die Fristenprüfung erfolgreich durchlaufen, ermittelt die Rentenermittlung die Höhe der unverfallbaren Anwartschaft gemäß dem Berechnungsverfahren des Anspruchs:
    a. Bewertung der dem Mitarbeiter zugesagten Ansprüche bis zum Austritt
    b. Zuwachsermittlung

c. Ratierliche Kürzung

Siehe auch:

Unverfallbare Anwartschaft mit Zuwachsermittlung und ratierlicher Kürzung [Page 319]

23. Die Höhe der späteren Altersrente stellt die Rentenermittlung als unverfallbare Anwartschaft in einer eigenen Lohnart pro Anspruch ab. Die Lohnarten selbst speichert die Rentenermittlung in der BAV-Datenbank als unverfallbare Anwartschaften unter der Personalnummer des Mitarbeiters.ab.
24. Sie starten das Bescheinigungswesen und erstellen für den Mitarbeiter eine Bescheinigung über die Höhe seiner unverfallbaren Anwartschaft.

Ergebnis

Falls keine unverfallbaren Anwartschaften vorliegen, der Mitarbeiter aber eigene Beiträge eingezahlt hat, haben Sie die Rückerstattung der Beiträge durchgeführt.

Sie haben für einen ausgetretenen Mitarbeiter überprüft, ob unverfallbare Anwartschaften vorliegen. Falls ja, haben Sie die Höhe der unverfallbaren Anwartschaften ermittelt und in der BAV-Datenbank gespeichert.

Sie haben dem Mitarbeiter eine Bescheinigung über die Höhe seiner unverfallbaren Anwartschaft ausgestellt.

Unverfallbare Anwartschaft mit Zuwachsermittlung und ratierlicher Kürzung

Unverfallbare Anwartschaften (UA) werden mit folgender Formel berechnet:

UA = (R1 + Z) * M / N

R1 = der bewertete Anspruch vom Eintritt des Mitarbeiters bis zum Austritt aus dem Unternehmen

Z = Zuwachs. Der Zuwachs errechnet sich, indem man den Anspruch über einen fiktiven Gesamtzeitraum vom Eintritt des Mitarbeiters bis zum Erreichen des Endalters laut Versorgungsordnung (in der Regel 65 Jahre) bewertet und von diesem Betrag **R1** abzieht.

M = tatsächliche Betriebszugehörigkeit von Firmeneintritt bis Austritt

N = fiktive Betriebszugehörigkeit von Firmeneintritt bis zum Endalter gemäß Versorgungsordnung

Die *Rentenermittlung* (RPCWVSD0) berechnet die Höhe der unverfallbaren Anwartschaft in drei Schritten:

1. **Bewerten der zugesagten Ansprüche bis zum Austritt**
2. **Zuwachsermittlung**
3. **Ratierliche Kürzung**

Ihrem Mitarbeiter Paul Schmitt ist ein Anspruch *Altersrente* zugesagt. Die Höhe des Anspruchs wird mit einem Berechnungsverfahren *Dienstzeit auf Einkommen* ermittelt. Pro Dienstjahr sollen 0,5% des durchschnittlichen Monatseinkommens eine Jahresrente bilden.

Für Paul Schmitt gelten folgende Angaben:

– Geboren am 01.01.1935

– Eintritt in das Unternehmen: 01.01.1980

– Austritt aus dem Unternehmen:01.01.1990

– Durchschnittliches Monatseinkommen über den gesamten Anspruchszeitraum: 5.000 DEM

– Durchschnittliches Monatseinkommen der letzten zwei Dienstjahre: 7.000 DEM

– Endalter gemäß Versorgungsordnung: 65 Jahre

– Betriebszugehörigkeit von Firmeneintritt bis Austritt (**M**): 10 Jahre

– Fiktive Betriebszugehörigkeit von Firmeneintritt bis zum Endalter gemäß Versorgungsordnung (**N**): 20 Jahre

Bewerten der zugesagten Ansprüche bis zum Austritt

In einem ersten Schritt bewertet die *Rentenermittlung* (RPCWVSD0) den Anspruch *Altersrente* vom Eintritt (01.01.1980) bis zum Austritt (01.01.1990) des Mitarbeiters. Für jedes der insgesamt

10 Jahre bilden 0,5% des monatlichen Durchschnittseinkommens die Höhe des Anspruchs auf Altersrente:

5.000 DEM * 0,5% * 10 Jahre = 250 DEM Altersrente für den Zeitraum bis zum Austritt (**R1**)

Zuwachsermittlung

In einem zweiten Schritt führt die Rentenermittlung die Zuwachsermittlung durch. Hierfür wird ein fiktiver Gesamtzeitraum betrachtet vom Eintritt (01.01.1980) bis zu dem Tag, an dem der Mitarbeiter das Endalter gemäß Versorgungsordnung (65 Jahre) erreicht. In unserem Beispiel reicht dieser fiktive Gesamtzeitraum demnach vom 01.01.1980 bis zum 01.01.2000 und umfaßt 20 Jahre. Auch für diesen fiktiven Gesamtzeitraum bewertet die Rentenermittlung den Anspruch auf Altersrente mit 0,5% pro Dienstjahr. Basis für die Zuwachsermittlung ist laut Versorgungsordnung das durchschnittliche Monatseinkommen der letzten zwei Dienstjahre (7.000 DEM):

7.000 DEM * 0,5% * 20 Jahre = 700 DEM Altersrente für den fiktiven Gesamtzeitraum

Die Differenz zwischen der fiktiven Altersrente und der monatlichen Altersrente ergibt dem Zuwachs:

700 DEM - 250 DEM = 450 DEM Zuwachs (**Z**)

Ratierliche Kürzung

In einem dritten Schritt ermittelt die Rentenermittlung nun die Höhe des unverfallbaren Anspruchs mit dem Verfahren der ratierlichen Kürzung (ratierliche Methode):

UA	=	(250 DEM + 450 DEM)	*	10 / 20 = 350 DEM		
		R1		**Z**	**M**	**N**

Die Höhe der unverfallbaren Anwartschaft beträgt 350 DEM. Dieser Betrag wird in der BAV-Datenbank abgespeichert.

Beitragsrückerstattung

Verwendung

Integration

Die Funktion Beitragsrückerstattung wird automatisch

Voraussetzungen

Funktionsumfang

Aktivitäten

Beitragsrückerstattung schlüsseln

in der BAV-Datenbank kennzeichnen

->Batch-Input

Wiedereintritt als Firmenrentner mit unverfallbarer Anwartschaft

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses stellen Sie einen ehemaligen Mitarbeiter, der aus seiner früheren Tätigkeit in Ihrem Unternehmen eine unverfallbare Anwartschaft auf eine Altersrente besitzt, als Rentner wieder ein und ermitteln seine Altersrente.

Voraussetzungen

Sie haben die entsprechenden Einstellungen im Einführungsleitfaden (IMG) wie im Geschäftsfall Altersrente [Page 312] beschrieben vorgenommen.

Customizing Personalmaßnahmen

Um den zuvor ausgetretenen Mitarbeiter als Rentner wieder in das Unternehmen eintreten zu lassen, verwenden Sie die Personalmaßnahme *Vorruhestand/Pensionierung*. Diese Personalmaßnahme ist in der SAP-Standardauslieferung so eingestellt, daß sie nicht durchgeführt werden kann, wenn der Mitarbeiter bereits ausgetreten ist. Hierzu prüft das Merkmal *MSN32* (Maßnahme Vorruhestand/Pensionierung) beim Durchführen der Personalmaßnahme *Vorruhestand/Pensionierung* den aktuellen Beschäftigungsstatus des Mitarbeiters im Infotyp *Maßnahmen* (0000). Ist der Beschäftigungsstatus *0* (ausgetreten), so gibt die Personalmaßnahme eine Fehlermeldung aus. Sie müssen nun das Merkmal *MSN32* so anpassen, das auch für ausgetretene Mitarbeiter mit Beschäftigungsstatus *0* (ausgetreten) die Personalmaßnahme *Vorruhestand/Pensionierung* durchgeführt werden kann.

Weitere Informationen finden Sie im IMG der *Personaladministration* unter *Anpassung der Arbeitsabläufe* → *Maßnahmen* → Personalmaßnahmenarten bestimmen [Ext.].

Ablauf

25. Sie führen die Personalmaßnahme *Vorruhestand/Pensionierung*, Maßnahmengrund *Pensionierung* durch. Beginndatum der Maßnahme ist das Pensionierungsdatum des Mitarbeiters.
26. Sie starten die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Eigenrente.*
27. Die Rentenermittlung liest den Infotyp *Maßnahmen* (0000) und erkennt, daß die Maßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Pensionierung* durchgeführt wurde. Dementsprechend wird der Verarbeitungstyp *Eigenrente*, Verarbeitungsanlaß *Altersrente* ausgelöst.
28. Die Rentenermittlung liest die Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) und erkennt, das die Ansprüche unverfallbar sind und bereits bewertet wurden. Die bereits bewerteten Ansprüche werden erneut bewertet und die Altersrente in folgenden Schritten berechnet:
    a. Bewertung der dem Mitarbeiter zugesagten Ansprüche bis zum Austritt
    b. Zuwachsermittlung
    c. Ratierliche Kürzung

Siehe auch:

Altersrente mit Zuwachsermittlung und ratierlicher Kürzung [Page 324]

29. Die Rentenermittlung speichert die Lohnarten im Infotyp *Rentenbasisbezüge* (0201).
30. Sie starten das Bescheinigungswesen und erstellen für den Mitarbeiter eine Bescheinigung über die Höhe seiner Altersrente.

Ergebnis

Sie haben für einen pensionierten Mitarbeiter die Altersrente aus seiner unverfallbaren Anwartschaft ermittelt und als Lohnart im Infotyp *Rentenbasisbezüge* (0201) gespeichert. Damit steht die Altersrente zur Auszahlung durch die Personalabrechnung bereit.

Sie haben dem Mitarbeiter eine Bescheinigung über die Höhe seiner Altersrente ausgestellt.

Altersrente mit Zuwachsermittlung und ratierlicher Kürzung

Die Altersrente aus unverfallbarer Anwartschaft wird mit folgender Formel berechnet:

Altersrente = (R1 + Z) * M / N

R1 = der bewertete Anspruch vom Eintritt des Mitarbeiters bis zum Austritt aus dem Unternehmen

Z = Zuwachs. Im Falle einer Altersrente aus unverfallbarer Anwartschaft errechnet sich der Zuwachs, indem man den Anspruch vom Eintritt des Mitarbeiters in das Unternehmen bis zum Eintritt des Versorgungsfalles bewertet und von diesem Betrag **R1** abzieht.

M = tatsächliche Betriebszugehörigkeit von Firmeneintritt bis Austritt

N = fiktive Betriebszugehörigkeit von Firmeneintritt bis zum Endalter gemäß Versorgungsordnung

Die *Rentenermittlung* (RPCWVSD0) berechnet die Höhe der unverfallbaren Anwartschaft in drei Schritten:

4. **Bewerten der zugesagten Ansprüche bis zum Austritt**
5. **Zuwachsermittlung**
6. **Ratierliche Kürzung**

Ihr Mitarbeiter Paul Schmitt ist ein Anspruch *Altersrente* zugesagt. Die Höhe des Anspruchs wird mit einem Berechnungsverfahren *Dienstzeit auf Einkommen* ermittelt. Pro Dienstjahr sollen 0,5% des durchschnittlichen Monatseinkommens eine Jahresrente bilden.

Für Paul Schmitt gelten folgende Angaben:

– Geboren am 01.01.1935
– Eintritt in das Unternehmen: 01.01.1980
– Austritt aus dem Unternehmen:01.01.1990
– Durchschnittliches Monatseinkommen über den gesamten Anspruchszeitraum: 5.000 DEM
– Durchschnittliches Monatseinkommen der letzten zwei Dienstjahre: 7.000 DEM
– Endalter gemäß Versorgungsordnung: 65 Jahre
– Pensionierung: 31.12.1997
– Wiedereintritt in das Unternehmen als Firmenrentner: 01.07.2000
– Betriebszugehörigkeit von Firmeneintritt bis Austritt (**M**): 10 Jahre
– Fiktive Betriebszugehörigkeit von Firmeneintritt bis zum Endalter gemäß Versorgungsordnung (**N**): 20 Jahre

Bewerten der zugesagten Ansprüche bis zum Austritt

In einem ersten Schritt bewertet die *Rentenermittlung* (RPCWVSD0) erneut den Anspruch *Altersrente* vom Eintritt (01.01.1980) bis zum Austritt (01.01.1990) des Mitarbeiters. Für jedes der insgesamt 10 Jahre bilden 0,5% des monatlichen Durchschnittseinkommens die Höhe des Anspruchs auf Altersrente:

5.000 DEM * 0,5% * 10 Jahre = 250 DEM Altersrente für den Zeitraum bis zum Austritt (**R1**)

Zuwachsermittlung

In einem zweiten Schritt führt die Rentenermittlung die Zuwachsermittlung durch. Hierfür wird ein fiktiver Gesamtzeitraum betrachtet vom Eintritt (01.01.1980) bis zum Tag der Pensionierung. In unserem Beispiel reicht dieser fiktive Gesamtzeitraum demnach vom 01.01.1980 bis zum 31.12.1997 und umfaßt 18 Jahre. Auch für diesen fiktiven Gesamtzeitraum bewertet die Rentenermittlung den Anspruch auf Altersrente mit 0,5% pro Dienstjahr. Basis für die Zuwachsermittlung ist laut Versorgungsordnung das durchschnittliche Monatseinkommen der letzten zwei Dienstjahre (7.000 DEM):

7.000 DEM * 0,5% * 18 Jahre = 630 DEM Altersrente für den fiktiven Gesamtzeitraum

Die Differenz zwischen der fiktiven Altersrente und der monatlichen Altersrente ergibt dem Zuwachs:

630 DEM - 250 DEM = 380 DEM Zuwachs (**Z**)

Ratierliche Kürzung

In einem dritten Schritt ermittelt die Rentenermittlung nun die Höhe des unverfallbaren Anspruchs mit dem Verfahren der ratierlichen Kürzung (ratierliche Methode):

UA	=	(250 DEM + 380 DEM)	*	10 / 20 = 315 DEM		
		R1		**Z**	**M**	**N**

Die Höhe der unverfallbaren Anwartschaft beträgt 315 DEM. Dieser Betrag wird in der BAV-Datenbank abgespeichert.

Hinterbliebenenrente

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses ermitteln Sie die Hinterbliebenenrente aus der Betrieblichen Altersversorgung für die Angehörigen (Witwen und Waisen) eines verstorbenen Mitarbeiters.

Voraussetzungen

Customizing

Leistungsarten und Ansprüche

- Sie haben entweder für den gesamten Anspruch auf *Eigenrente* oder speziell für die Leistungsart *Hinterbliebenenrente* eine Lohnart definiert, mit der die Rente ausgezahlt wird. Weitere Informationen hierzu finden Sie im Einführungsleitfaden (IMG) der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Ansprüche anlegen* → Ansprüche definieren [Ext.] bzw. unter *Leistungsarten* → Leistungsarten einrichten [Ext.].
- Sie haben als eine mögliche Leistungsart zum Anspruch auf Eigenrente die Leistungsart *Hinterbliebenenrente* hinterlegt. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* -> Leistungsarten zum Anspruch [Ext.].

Rentenermittlung

- Sie haben festgelegt, daß die Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Pensionierung* in der Rentenermittlung den Verarbeitungstyp *Eigenrente* mit der Leistungsart *Altersrente* auslöst. Weitere Informationen hierzu finden Sie im IMG de*r Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Zuordnung Maßnahme/-gründe zum Verarbeitungsanlaß [Ext.].
- Sie haben pro Anspruch festgelegt, welche Fristenprüfungen (Wartezeit, Unverfallbarkeit, Altersgrenze) erfolgreich durchlaufen werden müssen. Weitere Informationen hierzu finden Sie im IMG de*r Betrieblichen Altersversorgung* unter *Ansprüche* → *Fristenprüfungen* in den Kapiteln Wartezeit [Ext.], Unverfallbarkeit [Ext.] und Altersgrenze [Ext.].
- Sie haben für den Verarbeitungstyp Eigenrente und den Verarbeitungsanlaß Altersrente festgelegt, wie sich die Rentenermittlung - je nach Ergebnis der Fristenprüfungen - verhalten soll:
  - Werden die Fristenprüfungen nicht erfüllt, soll die Rentenermittlung überprüfen, ob eine Beitragsrückerstattung erfolgen muß und die Beitragsrückerstattung ggf. durchführen.
  - Werden die Fristenprüfungen erfüllt, sollen die Ansprüche bewertet, eine entsprechende Bescheinigung erstellt und die ermittelte Rente zur Auszahlung bereit gestellt werden.

  Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.]
- Sie haben ein Berechnungsverfahren eingerichtet, nach dem aus dem Anspruch bei erfolgreicher Fristenprüfung eine Hinterbliebenenrente ermittelt wird. Weitere Informationen hierzu finden Sie im IMG der Betrieblichen Altersversorgung unter *Steuerung Berechnungsverfahren.*

Ablauf

31. Sie führen die Personalmaßnahme *Austritt*, Maßnahmengrund *Tod des Mitarbeiters* durch. Beginndatum der Maßnahme ist das Sterbedatum des Mitarbeiters.
32. Sie stellen die Hinterbliebenen des Verstorbenen ein. Wir empfehlen, für die Einstellung von Hinterbliebenen eine eigene Personalmaßnahme [Page 328] zu verwenden.
33. Sie starten die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Hinterbliebenenrente.*
34. Die Rentenermittlung liest den Infotyp *Maßnahmen* (0000) des Erblassers und erkennt, daß die Maßnahme *Austritt* mit dem Maßnahmengrund *Tod des Mitarbeiters* durchgeführt wurde. Dementsprechend wird der Verarbeitungstyp *Hinterbliebenenrente*, Verarbeitungsanlaß *Hinterbliebenenrente* ausgelöst.
35. Der Rentenermittler liest die Ansprüche des Erblassers aus dem Infotyp *Ansprüche* (0202) und führt pro Anspruch die im Customizing hinterlegten Fristenprüfungen durch.
36. Für die Ansprüche, die die Fristenprüfung **nicht** erfolgreich durchlaufen, führt die Rentenermittlung ggf. eine Beitragsrückerstattung [Page 321] durch.
37. Für die Ansprüche, die die Fristenprüfungen erfolgreich durchlaufen, ermittelt der Report die Rente gemäß dem Berechnungsverfahren des Anspruchs. Ermittelt wird dabei zunächst die Rente, die der Erblasser erhalten hätte.
38. Anhand der Personalnummer des Erblassers, die bei den Hinterbliebenen im Infotyp *Familie/Bezugsperson* (0021), Subtyp *Erblasser BAV* (DE01) angegeben, ist ermittelt der Rentenermittler die Hinterbliebenen. Die Rente, die der Erblasser erhalten hätte, wird auf die Hinterbliebenen - gemäß Berechnungsverfahren - verteilt.
39. Falls im Customizing des Berechnungsverfahrens vorgesehen, führt die Rentenermittlung zusätzlich eine Hinterbliebenenkürzung durch.
40. Die ermittelten Hinterbliebenenrenten werden im Infotyp *Rentenbasisbezüge* (0201) unter den Personalnummern der Hinterbliebenen gespeichert.
41. Sie starten das Bescheinigungswesen und erstellen für die Hinterbliebenen eine Bescheinigung über die Höhe der Hinterbliebenenrente.

Ergebnis

Sie haben für die Hinterbliebenen eines verstorbenen Mitarbeiters deren Hinterbliebenenrente ermittelt und als Lohnart im Infotyp *Rentenbasisbezüge* (0201) gespeichert. Damit stehen die Hinterbliebenenrenten zur Auszahlung durch die Personalabrechnung bereit.

Sie haben den Hinterbliebenen eine Bescheinigung über die Höhe der Hinterbliebenenrente ausgestellt.

Personalmaßnahme: *Einstellung von Hinterbliebenen*

Definition

Personalmaßnahme, die alle Infotypen zur Pflege anbietet, die zur Einstellung der Hinterbliebenen eines Erblassers benötigt werden.

In der Standardauslieferung ist für die Einstellung von Hinterbliebenen keine eigene Personalmaßnahme vorgesehen. Falls Sie in Ihrem Unternehmen die Komponente *Betriebliche Altersversorgung* einsetzen, empfehlen wir Ihnen eine solche Personalmaßnahme einzurichten.

Verwendung

Sie verwenden die Personalmaßnahme *Einstellung von Hinterbliebenen*, um die Witwe/den Witwer sowie die Waisen des Erblassers im SAP-System einzustellen. Die in der Personalmaßnahme erfaßten Daten werden zur Verwaltung der Hinterbliebenen im Rahmen der BAV und zur Auszahlung der Hinterbliebenenrente durch die Abrechnung benötigt.

Struktur

Folgende Infotypen müssen in die Infotypgruppe der Personalmaßnahme aufgenommen werden:

- *Maßnahmen* (Infotyp 0000)
- *Organisatorische Zuordnung* (Infotyp 0001)
- *Sollarbeitszeit* (Infotyp 0007)
- *Basisbezüge* (Infotyp 0008)

  Der Infotyp *Basisbezüge* (0008) wird bei Hinterbliebenen lediglich aus technischen Gründen benötigt, da die abrechnungsrelevanten Daten aus dem Infotyp *Basisbezüge* (0008) (Tarifart, -gebiet, .-gruppe und -stufe) Voraussetzung für die Abrechnung sind. Wir empfehlen, den Infotyp *Basisbezüge* (0008) innerhalb der Personalmaßnahme ohne Angabe einer Lohnart anzulegen. Dadurch ist sichergestellt, daß der Abrechnungstreiber zwar die Hinterbliebenen selektiert, aber nur die Hinterbliebenenrente aus dem Infotyp *Rentenbasisbezüge* (0201) berücksichtigt.
- *Steuerdaten* (Infotyp 0012)
- *Sozialversicherung* (Infotyp 0013)
- *Familie*/*Bezugsperson* (Infotyp 0021)

  Hier wird die Personalnummer des Erblassers eingetragen. Durch die Personalnummer des Erblassers wird die Verbindung zwischen Erblasser und Hinterbliebenem hergestellt.
- *Renten-*/*Bewertungsstatus* BAV (0203)

  Das Vorhandensein des Infotyps ist Voraussetzung für die Durchführung der Rentenermittlung.

  Eine Besonderheit stellt der Infotyp *Basisbezüge* (0008) dar. Der Infotyp Basisbezüge (0008) wird bei Hinterbliebenen lediglich aus technischen Gründen benötigt, da die abrechnungsrelevanten Daten aus dem Infotyp Basisbezüge (0008) Voraussetzung für die Abrechnung sind. In vielen Unternehmen besteht daher der

Personalmaßnahme: Einstellung von Hinterbliebenen

Wunsch, bei der Einstellung von Hinterbliebenen den Infotyp Basisbezüge nicht pflegen zu müssen.

Statt den Infotyp Basisbezüge bei der Einstellung von Hinterbliebenen jedesmal zu pflegen, können Sie die entsprechenden Parameter in der Sicht *BAV-Systemparameter* (V_5DCY_A) fest vorgeben:

Tarifart: (Parameter TFAR)

Tarifgebiet: (Parameter TFGB)

Tarifgruppe: (Parameter TFGR)

Tarifstufe: (Parameter TFST)

Diese Angaben ersetzen in der Abrechnung die entsprechenden Angaben aus dem Infotyp *Basisbezüge* (0008), falls der Infotyp *Basisbezüge* (0008) bei einem Mitarbeiter nicht vorhanden ist.

Invalidenrente

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses pensionieren Sie einen aktiven Mitarbeiter wegen Invalidität und ermitteln die Invalidenrente, die der Mitarbeiter aus Ihrer Betrieblichen Altersversorgung erhält. In der Regel schreiben Versorgungsordnungen vor, daß im Falle von Invalidität eine Hochrechnung der Invalidenrente (z.B. auf ein bestimmtes Endalter) erfolgen soll. Diese Zuwachsermittlung erfolgt automatisch durch die Rentenermittlung.

Voraussetzungen

Customizing

Leistungsarten und Ansprüche

- Sie haben entweder für den gesamten Anspruch auf *Eigenrente* oder speziell für die Leistungsart *Invalidenrente* eine Lohnart definiert, mit der die Rente ausgezahlt wird. Weitere Informationen hierzu finden Sie im Einführungsleitfaden (IMG) der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Ansprüche anlegen* → Ansprüche definieren [Ext.] bzw. unter *Leistungsarten* → Leistungsarten einrichten [Ext.].
- Sie haben als eine mögliche Leistungsart zum Anspruch auf Eigenrente eine Leistungsart *Invalidenrente* hinterlegt. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* -> Leistungsarten zum Anspruch zuordnen [Ext.].
- Sie haben ein Berechnungsverfahren eingerichtet, nach dem aus dem Anspruch bei erfolgreicher Fristenprüfung eine Altersrente ermittelt wird. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Ansprüche* → *Steuerung Berechnungsverfahren.*

Rentenermittlung

- Sie haben festgelegt, daß die Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Invalidität* in der Rentenermittlung den Verarbeitungstyp *Eigenrente* mit dem Verarbeitungsanlaß *Invalidenrente* auslöst. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Zuordnung Maßnahme/-gründe zum Verarbeitungsanlaß [Ext.].
- Sie haben zu jedem Berechnungsverfahren festgelegt, wie die Zuwachsermittlung bei Invalidenrente erfolgen soll. Weitere Informationen hierzu finden Sie im IMG der Betrieblichen Altersversorgung unter Steuerung *Berechnungsverfahren* → *<Berechnungsverfahren>* → *Hochrechnung von Ansprüchen in die Zukunft.*
- Im Falle der Invalidität eines Mitarbeiters finden normalerweise keine Fristenprüfungen statt. Dementsprechend haben Sie festgelegt, daß für den Verarbeitungstyp *Eigenrente* und den Verarbeitungsanlaß *Invalidenrente* keine Fristenprüfungen (Wartezeit, Altersgrenze, Unverfallbarkeit) erfolgen sollen.
  Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.]

Ablauf

1. Sie führen die Personalmaßnahme *Vorruhestand/Pensionierung* mit dem Maßnahmengrund *Invalidität* durch.
2. Sie starten für den Mitarbeiter die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Eigenrente.*
3. Die Rentenermittlung liest den Infotyp *Maßnahmen* (0000) und erkennt, daß die Maßnahme *Vorruhestand/Pensionierung,* Maßnahmengrund *Invalidität* durchgeführt wurde. Dementsprechend wird der Verarbeitungsanlaß *Invalidenrente* ausgelöst.
4. Die Rentenermittlung liest die Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) und ermittelt die Invalidenrente gemäß dem Berechnungsverfahren des Anspruchs:
   - Bewertung der dem Mitarbeiter zugesagten Ansprüche bis zur Invalidität.
   - Zuwachsermittlung
   - Summieren zur Invalidenrente

   Siehe auch:

   Beispiel: Invalidenrente rechnen (kommt noch!)
5. Den Betrag der Invalidenrente stellt die Rentenermittlung in einer eigenen Lohnart pro Anspruch ab. Die Lohnarten selbst speichert die Rentenermittlung in der BAV-Datenbank als Invalidenrente unter der Personalnummer des Mitarbeiters.ab.
6. Sie starten das Bescheinigungswesen und erstellen für den Mitarbeiter eine Bescheinigung über die Höhe der Invalidenrente.

Ergebnis

Sie haben für einen Mitarbeiter die Invalidenrente aus der Betrieblichen Altersversorgung ermittelt und als Lohnart im Infotyp *Rentenbasisbezüge* (0201) gespeichert. Damit steht die Invalidenrente zur Auszahlung durch die Personalabrechnung bereit.

Sie haben dem Mitarbeiter eine Bescheinigung über die Höhe seiner Altersrente ausgestellt.

Simulation Altersrente

Einsatzmöglichkeiten

Mit Hilfe dieses Prozesses ermitteln Sie auf Anfrage eines Mitarbeiters simulativ die Höhe der Altersrente, die der Mitarbeiter zu einem bestimmten Zeitpunkt (z.B. bei Erreichen des 65-Lebensjahres) bekommen würde. Im Gegensatz zu den übrigen Geschäftsfällen, die immer eine Personalmaßnahme als Auslöser für einen Verarbeitungsanlaß in der Rentenermittlung benötigen, können Sie Simulationen jederzeit durchführen.

Voraussetzungen

Customizing

Leistungsarten und Ansprüche

Sie haben für Leistungsarten und Ansprüche die entsprechenden Einstellungen im Einführungsleitfaden (IMG) wie im Geschäftsfall Altersrente [Page 312] beschrieben vorgenommen.

Rentenermittlung

- Sie haben für den Verarbeitungstyp *Simulation Altersrente* und den Verarbeitungsanlaß *Simulation Altersrente* festgelegt, das in der Rentenermittlung keine Fristenprüfungen stattfinden sollen.
  Bei einer Simulation können das auslösende Datum für die Rentenermittlung sowie das Zuwachsende nicht automatisch über einen Verarbeitungsanlaß ermittelt werden, da in den Stammdaten des Mitarbeiters keine entsprechende Personalmaßnahme durchgeführt wurde. Daher müssen Sie festlegen, daß im Reportselektionsbild der Rentenermittlung (Report RPCWVSD0) [Page 340] das auslösende Datum und das Endalter bzw. Datum, bis zu dem die Zuwachsermittlung gehen soll, eingebbar sind. Hierfür passen Sie das Reportselektionsbild entsprechend an. Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.].
- Sie haben ein Berechnungsverfahren eingerichtet, nach dem aus dem Anspruch eine Altersrente ermittelt wird. Weitere Informationen hierzu finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Berechnungsverfahren.*

Bescheinigungen

In der Standardauslieferung wird bei der Simulation der Altersrente keine Bescheinigung erstellt. Falls Sie Ihrem Mitarbeiter zu Auskunftszwecken eine Bescheinigung über die simulierte Berechnung der Altersrente ausstellen möchten, müssen Sie entsprechende Änderungen im Customizing vornehmen.

- Im Bescheinigungswesen richten Sie einen eigenen Bescheinigungstyp und eine eigene Bescheinigung für die Simulation der Altersrente ein. Weitere Informationen finden Sie IMG der *Betrieblichen Altersversorgung* im Kapitel *Bescheinigungen.*
- In der Sicht *Verarbeitungstyp* (V_T5DW5) hinterlegen Sie für den Verarbeitungstyp *Simulation Altersrente* und den Verarbeitungsanlaß *Simulation Altersrente*, das die Ergebnisse dieser Verarbeitung in der Rentenermittlung für Bescheinigungen relevant sind. Hierzu markieren Sie das Feld *nur Bescheinigungen* im Gruppenrahmen *Laufoptionen*.

In der Sicht *Verarbeitungsanlaß* (V_5DC5_A) geben Sie Ihren eigenen Bescheinigungstyp für die Simulation der Altersrente an.
Weitere Informationen finden Sie im IMG der *Betrieblichen Altersversorgung* unter *Steuerung Rentenermittlung* → Ablaufsteuerung der Rentenermittlung [Ext.].

Ablauf

42. Sie starten die Rentenermittlung (Report RPCWVSD0) [Page 340] mit dem Verarbeitungstyp *Simulation Altersrente.*
43. Im Reportselektionsbild geben Sie neben der Personalnummer des Mitarbeiters das *auslösende Datum* und das *individuelle Zuwachsende* bzw. das *Lebensalter* für die Zuwachsermittlung ein.
44. Die Rentenermittlung liest die Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) und berechnet die Altersrente des Mitarbeiters zum *auslösenden Datum*, inklusive Zuwachsermittlung bis zum *individuellen Zuwachsende* bzw. *Lebensalter*.
45. Sie starten das Bescheinigungswesen und erstellen für den Mitarbeiter eine Bescheinigung über die Höhe seiner simulierten Altersrente.

Ergebnis

Im Protokoll der Rentenermittlung wird die simulativ ermittelte Altersrente ausgeben. Da es sich um eine Simulation handelt, erfolgt kein Update auf die BAV-Datenbank. Die ermittelte Rente wird nicht im Infotyp *Rentenbasisbezüge* (0201) abgespeichert.

Übernahme von Daten in die BAV-Datenbank (Report RPCWUBD0)

Verwendung

Verwenden Sie den Report *RPCWUBD0* (Übernahme Einkommen/Beiträge BAV) um in der Abrechnung ermittelte *Einkommen* bzw. *Beiträge* zu einem Anspruch in die BAV-Datenbank zu übernehmen. Falls Ihre Betriebliche Altersversorgung nicht auf Beiträgen und Einkommen basiert, müssen Sie keine Datenübernahme durchführen, da bei dienstzeitorientierten Berechnungsverfahren die relevanten Dienstzeiten direkt über den Anspruchsverlauf ermittelt werden.

Voraussetzungen

Stammdaten

Sie haben für Ihre Mitarbeiter die Infotypen *Versorgungsordnung* (0323) und *Ansprüche* (0202) gepflegt.

Sie haben den Infotyp *Renten-/Bewertungsstatus* (0203) angelegt.

Customizing

Sie haben die Sichten *Steuerung periodische Übernahme Beiträge* (V_T5DWQ) bzw. *Steuerung periodische Übernahme Einkommen* (V_T5DCL) gepflegt.

Sie haben das Merkmal *Schlüssel für periodische Basisermittlung* (DWCPB) gepflegt.

Informationen hierzu finden Sie im Einführungsleitfaden (IMG) *Abrechnung Deutschland* → *Betriebliche Altersversorgung* → *Übernahme Daten in die BAV-Datenbank*.

Funktionsumfang

Der Report liest die zugesagten Ansprüche eines Mitarbeiters aus dem Infotyp *Ansprüche* (0202). Jedem Anspruch ist ein Berechnungsverfahren zugewiesen. Basiert das Berechnungsverfahren des Anspruchs auf Beiträgen oder Einkommen aus der Abrechnung, so werden diese Beiträge und Einkommen in die BAV-Datenbank übernommen. Die BAV-Datenbank selbst besteht aus transparenten Tabellen. In den einzelnen Tabellen werden pro Mitarbeiter für jeden relevanten Anspruch die zugehörigen Beiträge/Einkommen abgespeichert.

Beiträge / Einkommen:	Tabelle (Sicht):	Kurzbeschreibung:
Effektive Beiträge	V_P01CBE	Alle effektiven Beiträge zu einem Anspruch
Fiktive Beiträge	V_P01CBF	Fiktive Beiträge werden für Hochrechnungen im Rahmen einer Simulation verwendet. Fiktive Beiträge, die Sie für eine Hochrechnung verwenden möchten, müssen Sie von Hand in die BAV-Datenbank einpflegen
Effektive Einkommen	V_P01CEE	Alle effektive Einkommen zu einem Anspruch

Fiktive Einkommen	V_P01CEF	Fiktive Einkommen werden für Hochrechnungen im Rahmen einer Simulation verwendet. Fiktive Einkommen, die Sie für eine Hochrechnung verwenden möchten, müssen Sie von Hand in die BAV-Datenbank einpflegen

Stichtag

Anhand Ihrer Eingaben in den Feldern im Gruppenrahmen *Stichtag* bestimmen Sie, für welchen Zeitraum Daten selektiert werden.

Ausgehend vom Stichtag werden Beiträge und Einkommen rückwirkend bis zu dem Zeitpunkt der letzten Datenübernahme übernommen.

Selektion

Anhand Ihrer Eingaben im Gruppenrahmen *Selektion* bestimmen Sie, für welche Mitarbeiter Daten übernommen werden.

Laufoptionen

Im Gruppenrahmen *Laufoptionen* bestimmen Sie, mit welchen Optionen (Test- oder Produktivlauf, Protokoll etc.) der Report ausgeführt wird.

Beachten Sie das Kennzeichen *Korrekturlauf*.

Ist das Kennzeichen *Korrekturlauf* markiert, werden alle vorhandenen Beiträge und Einkommen übernommen, auch wenn bereits Beiträge und Einkommen aus einer früheren Datenübernahme in der BAV-Datenbank vorhanden sind. Das Kennzeichen *Korrekturlauf* ist daher nur sinnvoll, wenn Sie nach Rückrechnungen geänderte Daten aus der Abrechnung erneut übernehmen müssen.

Aktivitäten

Beiträge und Einkommen aus der BAV-Datenbank sind Voraussetzung für die Rentenermittlung bzw. Anspruchsbewertung bei Berechnungsverfahren, die auf Beiträgen und Einkommen basieren. Bevor Sie die *Rentenermittlung* (RPCWVSD0) in einem solchen Fall starten, müssen Sie daher die Datenübernahme durchgeführt haben. SAP empfiehlt aus diesem Grund, die Datenübernahme regelmäßig jeden Monat durchzuführen.

Anzeigen und Pflegen von BAV-Daten

Verwendung

Die nachfolgend aufgeführten Reports verwenden Sie, um Daten aus der BAV-Datenbank anzuzeigen bzw. Daten eines Mitarbeiters in die BAV-Datenbank einzupflegen:

- *RPUWDAD0* (Pflege HR-BAV Datenbanken)
- *RPLWDAD2* (Liste BAV-Daten)

Funktionsumfang

Auflisten von BAV-Daten

Der Report *RPLWDAD2* (Liste BAV-Daten) listet für eine oder mehrere Personalnummern die vorhandenen BAV-Daten auf.

Im Reportselektionsbild können Sie gezielt auf bestimmte Daten einschränken, sich beispielsweise nur die effektiven Beiträge eines Mitarbeiters anzeigen lassen.

Die Ausgabe erfolgt in einer übersichtlichen Liste, geordnet nach Personalnummern. Aus diesem Übersichtsbild können Sie für jede Personalnummer in ein Detailbild verzweigen, das alle vorhandenen Daten enthält.

Pflegen von BAV-Daten

Der Report *RPUWDAD0* (Pflege HR-BAV Datenbanken) erlaubt Ihnen, für einzelne Mitarbeiter Daten in die BAV-Datenbank einzupflegen. Dies ist für Mitarbeiter notwendig, bei denen eine automatische Datenübernahme mit dem Report *RPCUWBD0* (Übernahme Einkommen/Beiträge BAV) nicht oder nur unvollständig möglich ist.

Die Pflege der BAV-Datenbank erfolgt für eine Personalnummer und eine transparente Tabelle. Folgende Sichten sind pflegbar:

Effektive Beiträge	V_P01CBE
Fiktive Beiträge	V_P01CBF
Effektive Einkommen	V_P01CEE
Fiktive Einkommen	V_P01CEF
Besitzstände	V_P01CGP
Unverfallbare Anwartschaften	V_P01CUA
Stand Anwartschaften (kumuliert)	V_P01CCV
Sonderinfor-mationen	V_P01CSO
Kapitalisierte Anwartschaften	V_P01CKA

Nicht pflegbar sind die Statusinformationen zur BAV (Stichtag, Verarbeitungsstatus,Anlaß etc.) Diese Informationen sind in der Sicht *V_P01CST*

(Statusinformationen) hinterlegt und werden nur durch die Rentenermittlung (RPCWVSD0) gepflegt.

Die Sicht *V_P01CSO* (Sonderinformationen) enthält kundenindividuelle Informationen zur BAV. Der Inhalt der Sicht kann frei bestimmt werden.

Rentenermittlung und weitere Anspruchsbewertungen

Einsatzmöglichkeiten

Diesen Prozeß verwenden Sie, um zugesagte Ansprüche aus dem Infotyp *Ansprüche* (0202) nach betriebswirtschaftlichen Kriterien geldlich zu bewerten und Auskünfte zu erteilen bzw. Bescheinigungen zu erstellen.

Sie verwenden den Prozeß für alle Anlässe, zu denen Ansprüche bewertet werden müssen (Rentenermittlung bei Eintritt des Versorgungsfalles, Ermittlung unverfallbarer Anwartschaften, Erteilen von Auskünften, etc.).

Voraussetzungen

Customizing

Um Renten zu ermitteln und Ansprüche zu bewerten müssen Sie im Customizing entsprechende Einstellungen vorgenommen haben. Informationen hierzu finden Sie im Einführungsleitfaden *Betriebliche Altersversorgung.*

Stammdaten

Sie haben Ihre Mitarbeiter in eine Versorgungsordnung aufgenommen (Infotyp *Versorgungsordnung* (0323)) und Ihren Mitarbeitern Ansprüche zugesagt (Infotyp *Ansprüche* (0202)).

Sie haben den Infotyp *Renten-/Bewertungsstatus* (0203) angelegt. Der Infotyp enthält Angaben zum Status des Mitarbeiters in der BAV und wird bei der Rentenermittlung ausgewertet.

Ablauf

Der Gesamtprozess gliedert sich in mehrere Arbeitsschritte:

1. **Übernehmen von Daten in die BAV-Datenbank**
2. **Bewertung (Rentenermittlung oder Anspruchsbewertung)**

1. Übernahme von Daten in die BAV-Datenbank

Eine Bewertung (Rentenermittlung oder Anspruchsbewertung) erfolgt auf Grundlage verschiedener Basen:

- Dienstzeiten
- Beiträge
- Einkommen

Die Basis der Bewertung wird durch das Berechnungsverfahren spezifiziert. Jedem Anspruch ist im Customizing ein Berechnungsverfahren zugeordnet.

Bei *dienstzeitorientierten Berechnungsverfahren* werden die relevanten Dienstzeiten direkt über den Anspruchsverlauf abgebildet.

Bei *einkommens-* oder *beitragsorientierten Berechnungsverfahren* dagegen werden Einkommen und Beiträge für einen Anspruch unter Umständen über den gesamten Anspruchszeitraum

benötigt. Hierbei entstehen Zeiträume von 30, 40 oder mehr Jahren, über die Daten gespeichert werden müssen. Da die Historie der Datenbanken der Personalabrechnung auf wesentlich kürzere Zeiträume beschränkt ist, müssen relevante Beiträge und Einkommen pro Anspruch regelmäßig in eine eigene BAV-Datenbank übernommen werden.

Auf Basis der BAV-Datenbank erfolgt die Rentenermittlung bzw. Anspruchsbewertung bei Ansprüchen mit beitrags- oder einkommensorientierten Berechnungsverfahren. Für die Datenübernahme steht der Report *RPCWUBD0* (Übernahme Einkommen/Beiträge BAV) zur Verfügung.

Siehe auch:

Übernahme von Daten in die BAV-Datenbank (RPCWUBD0) [Page 334]

2. Bewertung (Rentenermittlung oder Anspruchsbewertung)

Für die Bewertung steht der Report *RPCWVSD0* (Rentenermittlung) zur Verfügung. Der Report errechnet anhand der zugesagten Ansprüche des Mitarbeiters aus dem Infotyp *Ansprüche* (0202) die zum Stichtag resultierende Rente.

Siehe auch:

Rentenermittlung (RPCWVSD0) [Page 340]

Ergebnis

Arbeitsschritt:	Ergebnis:
Report *RPCWUBD0* (Übernahme Einkommen/Beiträge BAV)	Übernimmt Beiträge und Einkommen in die BAV-Datenbank
Report *RPCWVSD0* (Rentenermittlung)	Ermittelt Renten im tatsächlichen Versorgungsfall und bewertet Ansprüche. Ermittelte Renten werden im Infotyp Rentenbasisbezüge (0201) gespeichert. Bewertete Ansprüche werden in der BAV-Datenbank abgespeichert

Rentenermittlung (Report RPCWVSD0)

Verwendung

Sie verwenden den Report *Rentenermittlung* (RPCWSVD0) um Ansprüche, die Sie einem Mitarbeiter zugesagt haben, geldlich zu bewerten.

Der Report wird verwendet zur Rentenermittlung im Versorgungsfall sowie zu weiteren Anspruchsbewertungen.

Rentenermittlung

Eine Rentenermittlung wird bei Eintritt des Versorgungsfalls durchgeführt. Die tatsächliche Rente des Mitarbeiters wird ermittelt und im Infotyp *Rentenbasisbezüge* (0201) als Lohnart abgespeichert. Die Rente wird in der Abrechnung steuer- und sv-rechtlich bewertet und ausgezahlt.

Anlässe für eine Rentenermittlung sind:

- Altersrente
- Vorgezogene Altersrente
- Invalidenrente
- Hinterbliebenenrente

Weitere Anspruchsbewertungen

Neben der tatsächlichen Rentenermittlung im Versorgungsfall gibt es eine Reihe weiterer betriebswirtschaftlicher Kriterien, unter denen Ansprüche eines Mitarbeiters bewertet werden können:

- Bewertung unverfallbarer Anwartschaften bei Austritt des Mitarbeiters
- Turnusmäßiges Ausweisen des Standes der Anwartschaften
- Bewertung eines Anspruchs zum Stichtag oder in die Zukunft zum Zweck der Auskunft
- Besitzstandsrechnungen bei Ablösung "alter" Versorgungsordnungen

Im Gegensatz zur Rentenermittlung werden die Ergebnisse dieser Bewertungen nicht im Infotyp *Rentenbasisbezüge* (0201) abgespeichert sondern in der BAV-Datenbank abgelegt. Die Ergebnisse bleiben in der Abrechnung unberücksichtigt und werden nicht ausgezahlt.

Die Art der Rentenermittlung (tatsächliche Rentenermittlung oder Anspruchsbewertung) bestimmen Sie über die Auswahl eines *Verarbeitungstyps* beim Einstieg in die Rentenermittlung.

Siehe auch:

Verarbeitungstyp und Verarbeitungsanlaß [Page 343]

Voraussetzungen

Für Ansprüche, deren Berechnung auf Basis von Einkommen oder Beiträgen erfolgt, muß eine Datenübernahme aus der Abrechnung in die BAV-Datenbank erfolgt sein.

Stammdaten

Sie haben für Ihre Mitarbeiter die Infotypen *Versorgungsordnung* (0323) und *Ansprüche* (0202) gepflegt.

Sie haben den Infotyp *Renten-/Bewertungsstatus* (0203) angelegt.

Customizing

Sie haben Verarbeitungstypen und Verarbeitungsanlässe [Page 343] für den Report *RPCWVSD0* gepflegt.

Sie haben für jeden Verarbeitungstyp festgelegt, welche *Personalmaßnahmen* bzw. *Maßnahmengründe* einen bestimmten Verarbeitungsanlaß auslösen. Diese Zuordnung treffen Sie im Merkmal *DWCRA* (Zuordnung Maßnahmen/-gründe zum Rentenermittlungsanlaß).

Informationen hierzu finden Sie im Einführungsleitfaden *Abrechnung Deutschland* → *Betriebliche Altersversorgung* → *Steuerung Rentenermittlung*.

Sie haben für jeden Anspruch festgelegt, für welchen *Verarbeitungstyp* und *Verarbeitungsanlaß* eine bestimmte Leistungsart ausgelöst wird. Die Zuordnung zur Leistungsart treffen Sie im Merkmal *DWCRE* (Auslöser für abgeleitete Ansprüche in der Rentenermittlung).

Informationen hierzu finden Sie im Einführungsleitfaden *Betriebliche Altersversorgung* → *Ansprüche* → *Leistungsarten zum Anspruch* → *Auslöser für Leistungsarten*.

Funktionsumfang

Verarbeitungstyp

Der Report *RPCWVSD0* (Rentenermittlung) wird über Auswahl eines *Verarbeitungstyps* gestartet. Ausgehend vom gewählten Verarbeitungstyp wird die weitere Verarbeitung gesteuert.

Stichtag

Alle relevanten Daten eines Mitarbeiters vom Eintrittsdatum bis zu diesem Stichtag werden gelesen.

Personenauswahl

Selektiert werden eine oder mehrere Personalnummern. Die Art der Personenauswahl (eine oder mehrere) wird im Customizing pro Verarbeitungstyp festgelegt.

Ablauf des Reports

Selektierte Daten

Der Report liest für jeden selektierten Mitarbeiter ausgehend vom *Stichtag*:

- die zugesagten Ansprüche aus dem Infotyp *Ansprüche* (0202).
- die zu jedem Anspruch im Customizing zugeordneten *Leistungsarten*
- die durchgeführten Personalmaßnahmen aus dem Infotyp *Maßnahmen* (0000).

Ermitteln und Auslösen des Verarbeitungsanlasses

Anlaß für die Verarbeitung eines Anspruchs mit dem Report *RPCWVSD0* ist immer eine zuvor durchgeführte *Personalmaßnahme*, gemeinsam mit einem *Maßnahmengrund*. Beispielsweise ist

der Verarbeitungsanlaß für eine Altersrente die Personalmaßnahme **14** (Vorruhestand/Pensionierung) mit dem Maßnahmengrund **01** (Pensionierung).

Über das Merkmal *DWCRA* (Zuordnung Maßnahmen/-gründe zum Rentenermittlungsanlaß) ermittelt der Report anhand einer vorliegenden Personalmaßnahme und des Maßnahmengrundes den *Verarbeitungsanlaß*.

Im Customizing sind pro Verarbeitungsanlaß Prüfungen hinterlegt, die durchlaufen werden müssen (Wartezeitprüfung, UA-Prüfung, Prüfung der Altersgrenze etc.). Die zum Verarbeitungsanlaß hinterlegten Prüfungen werden vom Report durchgeführt. Nur bei erfolgreicher Prüfung wird der Verarbeitungsanlaß ausgelöst und eine weitere Verarbeitung findet statt.

Ermitteln der Leistungsart

In der Regel sind für einen Anspruch mehrere mögliche Leistungsarten festgelegt, beispielsweise der Anspruch auf *Altersrente* mit den Leistungsarten *Altersrente*, *vorgezogene Altersrente* und *Invalidenrente*.

Über das Merkmal *DWCRE* (Auslöser für abgeleitete Ansprüche in der Rentenermittlung) ermittelt der Report anhand des vorliegenden Anspruchs, des Verarbeitungstyps und des ausgelösten Verarbeitungsanlasses die *Leistungsart* des Anspruchs.

Durchführen der Berechnung

Mit den nun vorliegenden Informationen wird die Rentenermittlung gemäß dem Berechnungsverfahren des Anspruchs durchgeführt. Stichtag für die Durchführung der Rentenberechnung ist dabei das Datum der Personalmaßnahme aus dem Infotyp *Maßnahmen* (0000), die den Verarbeitungsanlaß ausgelöst hat.

Siehe auch:

Berechnungsverfahren [Page 344]

Aktivitäten

Geben Sie die erforderlichen Daten ein und führen Sie den Report aus.

Verarbeitungstyp und Verarbeitungsanlaß

Definition

Der *Verarbeitungstyp* beschreibt das grundsätzliche Verfahren der Rentenermittlung. Er ist das wichtigste Steuerkriterium für den Report *RPCWVSD0* (Rentenermittlung) und wird beim Ausführen des Reports vom Benutzer vorgegeben.

Der *Verarbeitungsanlaß* beschreibt den auslösenden Grund für eine Rentenermittlung durch den Report *RPCWVSD0*. Jedem Verarbeitungstyp sind ein- oder mehrere Verarbeitungsanlässe zu geordnet.

Verwendung

Verarbeitungstyp

Der Report *RPCWVSD0* (Rentenermittlung) wird über Auswahl eines Verarbeitungstyps gestartet. Pro Verarbeitungstyp sind für den Report definiert:

- **Die Eingabemöglichkeiten auf dem Reportselektionsbild**

  Für jeden Verarbeitungstyp kann das Reportselektionsbild unterschiedlich gestaltet werden (Laufoptionen, Personalnummernselektion, etc.)

- **Der Verarbeitungsstatus**

  Betriebswirtschaftlicher Hintergrund für eine Rentenermittlung mit dem Report *RPCWVSD0* (Rentenermittlung, UA-Berechnung, zyklische Anwartschaft, Besitzstandsrechnung etc.). Der Verarbeitungsstatus wird bei jedem Lauf des Reports *RPCWVSD0* in der BAV-Datenbank abgespeichert.

- **Die Art der Ermittlung des auslösenden Datums**

  Das auslösende Datum ist der Stichtag, zu dem die Rentenermittlung bzw. Anspruchsbewertung erfolgt. Pro Verarbeitungstyp ist festgelegt, wie das auslösende Datum ermittelt wird:

  - durch Eingabe im Reportselektionsbild
  - identisch mit dem Ausführungsdatum des Reports
  - durch einen Funktionsbaustein

Verarbeitungsanlaß

Der Verarbeitungsanlaß steuert, welche Prüfungen bei der Rentenermittlung mit dem Report RPCWVSD0 durchlaufen werden:

- Prüfung Wartezeit
- Prüfung unverfallbare Anwartschaften
- Prüfung der Altersgrenze

Berechnungsverfahren

Verwendung

Jedes der im Standard ausgelieferten Berechnungsverfahren erfüllt zwei grundlegende Aufgaben:

- Bewertung des Anspruchs zu einem aktuellen Stand
- Hochrechnung des Anspruch nach vorzugebenden Regeln in die Zukunft

Funktionsumfang

Grundsätzlich wird unterschieden zwischen Berechnungsverfahren, die als Basis

- Dienstzeiten
- Einkommen
- Beträge

zugrunde legen.

Beitragsorientierte Verfahren

Für beitragsorientierte Ansprüche kann die Beitragsberechnung tabellengesteuert in der Personalabrechnung durchgeführt werden. Unterstützt wird dabei alternativ eine Monats- und eine Jahresbetrachtung. Für die Ermittlung der Beiträge in der Personalabrechnung können verschiedene Bereiche des versorgungsfähigen Einkommens unterschiedlich bewertet werden. Weiterhin ist die Bildung von festen oder benutzerdefinierten Höchstgrenzen möglich.

Bei der Zuordnung eines beitragsorientierten Anspruches wird beim jeweiligen Mitarbeiter festgelegt, ob er an der Berechnung teilnimmt oder nicht. Individuelle Vereinbarungen können das Regelwerk, nach dem ein Beitrag für einen Anspruch zu rechnen ist, beeinflussen oder übersteuern.

Die Beitragsberechnung bietet die Möglichkeit, bei bestimmten Abwesenheiten (z.B. Wehrdienst, Wehrübung) fiktive Beiträge zu ermitteln.

Die ermittelten Beiträge und Berechnungsgrundlagen werden im Abrechnungsergebnis mit Bezug auf den Anspruch gespeichert.

Einkommensorientierte Verfahren

Liegt einem Anspruch ein Einkommen als Bewertungsbasis zugrunde, kann die Ermittlung dieses versorgungsfähigen Einkommens tabellengesteuert in der Personalabrechnung durchgeführt werden. Bei der Zuordnung eines solchen Anspruches im Infotyp wird beim jeweiligen Mitarbeiter festgelegt, ob das versorgungsfähige Einkommen gebildet werden soll oder nicht.

Die Einkommensermittlung bietet die Möglichkeit, bei bestimmten Abwesenheiten (z.B. Wehrdienst, Wehrübung) fiktive Einkommen zu ermitteln.

Die ermittelten Einkommen werden in den Personalabrechnungsergebnissen mit Bezug auf eine BAV-spezifische Kennung des Einkommen gespeichert. Mit Hilfe der automatisierten Übernahme kann dieses Einkommen bei Bedarf in die BAV-Datenbank gespeist werden.

Berechnungsverfahren

Nachfolgend finden Sie eine Übersicht der im Standard ausgelieferten Berechnungsverfahren. Decken die bestehenden Verfahren mit ihren Steuertabellen die Anforderungen nicht ab, kann eine kundeneigenes Verfahren programmiert werden und unter Beibehaltung der weiteren Funktionalitäten eingebunden werden.

Beitragsorientiertes Verfahren

Verwendung

Das beitragsorientierte Verfahren geht von vorliegenden Beiträgen aus. Die Berechnung dieser Beiträge kann in der Abrechnung durchgeführt werden, die ermittelten Beiträge können in die BAV-Datenbank übernommen werden.

Alternativ zu einer Übernahme können Beiträge auch direkt in die BAV-Datenbank eingepflegt werden.

Funktionsumfang

Die Arbeitnehmer-Beiträge (AN-Beiträge) werden über die relevanten Anspruchszeiträume gesammelt. Die Arbeitgeber-Anteile (AG-Anteile) werden durch ein prozentuales Verhältnis dargestellt.

Das Verfahren berücksichtigt:

- Rückerstattete AN-Beiträge mit Berechnung der Rente aus AG-Anteilen
- Mindest- und Festbesitzstände zeitraumbezogen
- Gesetzliche Zuwachsermittlung mit ratierlicher Kürzung der AG-Beiträge bei Unverfallbarkeit

42% der eingezahlten AN-Beiträge als Jahresrente

Dienstzeitorientiertes Verfahren

Verwendung

Das dienstzeitorientierte Verfahren ermittelt relevante Dienstjahre über den Anspruchszeitraum und bewertet Jahresbereiche mit festen Beträgen.

Funktionsumfang

Das Verfahren berücksichtigt:

- Mindest- und Festbesitzstände zeitraumbezogen
- Gesetzliche Zuwachsermittlung mit m/n-telung bei Unverfallbarkeit
- Dienstjahre mit Teilzeitbeschäftigung

01. bis 05. Dienstjahr: 5 DM

06. bis 40. Dienstjahr: 8 DM

Einkommensorientiertes Verfahren

Verwendung

Das einkommensorientierte Verfahren ermittelt ein versorgungsfähiges Einkommen und verrentet dieses Einkommen.

Funktionsumfang

Bei der Ermittlung des versorgungsfähigen Einkommens können symbolische Grenzen (z.B. die Beitragsbemessungsgrenze) berücksichtigt werden. Das Einkommen kann dabei in unterschiedlich zu bewertende Bereiche aufgeteilt werden oder als gesamtes einem Selektionsbereich zugeordnet werden.

Das Verfahren berücksichtigt:

- Mindest- und Festbesitzstände zeitraumbezogen
- Gesetzliche Zuwachsermittlung mit m/n-telung bei Unverfallbarkeit
- Jährliche Bemessungsgrenzen
- Kürzungs-Bemessungsgrenzen bei Zeitraumsplits

RVBGJ: Beitragsbemessungsgrenze der gesetzlichen Rentenversicherung

2% von	RVBGJ	bis	(RVBGJ x 1,5)
3% von	(RVBGJ x 1,5)	bis	(RVBGJ x 2,0)

Verrentung des Gesamtbetrages mit 20% als Jahresrente

0%	wenn Provision kleiner 50.000
0,1%	wenn Provision größer 50.000 (für gesamte Provision)

Zulagen

Verwendung

Das zulagenorientierte Verfahren ermittelt prozentuale Aufschläge auf berechnete Renten. Der Aufschlag kann je nach Bedingung verschieden oft gewährt werden.

Funktionsumfang

Momentan ist implementiert:

- Zulage in Abhängigkeit bestimmter Kriterien aus Infoytyp *Familie / Bezugsperson* (0021)
- Zulage generell

Das Verfahren berücksichtigt:

- Bedingungen der Zulage
- Mindest-/Maximalzulage pro Gesamtanspruch oder einzelne Anteile eines Anspruchs

2,5% pro zulageberechtigtem Kind

Einkommens- und dienstzeitorientiertes Berechnungsverfahren

Verwendung

Das kombinierte Verfahren ermittelt:

- ein versorgungsfähiges Einkommen
- relevante Dienstzeitjahre über den Anspruchszeitraum und bewertet Jahresbereiche mit Prozentsätzen

Der sich ergebende Prozentsatz aus der Dienstzeitbewertung wird auf das versorgungsfähige Einkommen angewendet.

Die Dienstzeitbewertung wird entweder für Einkommensbereiche separat durchgeführt oder für das Gesamteinkommen als Selektionskriterium.

Funktionsumfang

Das Verfahren berücksichtigt:

- Mindest- und Festbesitzstände zeitraumbezogen
- Gesetzliche Zuwachsermittlung mit ratierlicher Kürzung bei Unverfallbarkeit

Das kombinierte Berechnungsverfahren stellt in der Regel eine Maximalrente dar auf die andere Renten, auch externe, angerechnet werden können.

Durchschnittliches Einkommen der letzten 24 Monate: 10000 DM

Dienstjahre: 40

RVBGJ: 100000 DM

01. bis 05. Dienstjahr:	1% für Einkommen 0 bis RVBGJ
06. bis 40. Dienstjahr:	2% für Einkommen 0 bis RVBGJ

Bei 2 % * 10000 DM = 200 DM

In Abzug zu bringen ist: PK-Rente (errechnet): 50 DM

Rente: 200 DM – 50 DM = 150 DM

Zurechnungszeiten

Verwendung

Das Verfahren der Zurechnungszeit verlängert bei vorzeitigem Eintritt des Versorgungsfalles den relevanten Berechnungszeitraum durch eine Zuwachsermittlung fiktiv bis zu einem vorgegebenem Endalter. Das Verfahren kann mit allen anderen Berechnungsverfahren, die eine Zuwachsermittlung unterstützen, kombiniert werden.

Funktionsumfang

Das Verfahren berücksichtigt:

- Hochrechnung Beiträge/Einkommen
- Hochrechnung Dienstzeiten
- variable Endalter

Hochrechnung der Invalidenrente bis zum Alter 55

Festbeträge

Verwendung

Das Berechnungsverfahren ermittelt den Festbetrag aus dem Infotyp 0202 und rechnet ihn ggf. auf einen Monatswert um.

Funktionsumfang

Das Verfahren berücksichtigt:

- Ratierliche Kürzung bei Unverfallbarkeit

1000.-DM Rente bei Erreichen des Endalters laut Versorgungsordnung

Auszahlung von Renten

Verwendung

Im Rahmen der Anspruchsbewertung können über die Ansprüche eines Mitarbeiters Renten (Versorgungsleistungen) berechnet werden. Das Ergebnis wird im Infotyp *Rentenbasisbezüge* (0201) gespeichert.

Funktionsumfang

Im Rahmen der Personalabrechnung können Sätze dieses Infotyps eingelesen und verarbeitet werden. Da die Zuordnung zum Anspruch, dem wichtigsten Steuerungskriterium der betrieblichen Altersversorgung, im Infotyp gewährleistet ist, können die Sätze des Infotyps aber auch im Rahmen der betrieblichen Altersversorgung weiterverarbeitet werden. Zum Beispiel können Rentenanpassungen durchgeführt werden oder Erblasserrenten zur Ermittlung von Hinterbliebenenrenten herangezogen werden.

Renten

Definition

Renten sind Versorgungsbezüge aus einer betrieblichen Altersversorgung.

Renten werden in *Rentenarten* und *Rententypen* unterteilt.

- **Rentenart**

  Bei der Rentenart wird grundsätzlich unterschieden, ob es sich um eine Eigenrente (z.B. Altersrente) oder eine Hinterbliebenenrente (z.B. Witwenrente) handelt. Die Unterscheidung in Rentenarten ermöglicht in der Abrechnung die steuerlich korrekte Behandlung von Hinterbliebenenrenten im Unterschied zu Hinterbliebenenrenten unabhängig von der Lohnart.

- **Rententyp**

  Der Rententyp ist eine weitere Unterteilung der Rentenart nach der Finanzierung bzw. Herkunft der zu erbringenden Versorgungsleistung. Hier wird etwa unterschieden, ob es sich um eine Rente aus einer Pensionskasse (aus Beiträgen der Mitarbeiter und des Unternehmens gemeinsam finanziert) oder um eine Firmenrente (allein vom Unternehmen finanziert) handelt.

Struktur

Im Customizing werden zunächst Rentenarten definiert, anhand derer Versorgungsbezüge in der Abrechnung unterschiedlich behandelt werden können.

Die R/3-Standardauslieferung enthält die Rentenarten:

– Eigenrente

– Hinterbliebenenrente

– Sonstige Rente

Zu jede Rentenart können Rententypen definiert werden. Jeder Rententyp bildet einen Subtypen des Infotyps *Rentenbasisbezüge* (0201). Die R/3-Standardauslieferung enthält die Rententypen:

– Pensionskassenrenten mit Rentenart Eigenrente

– Pensionskassenrenten mit Rentenart Hinterbliebenenrente

– Firmenrenten mit Rentenart Eigenrente

– Firmenrenten mit Rentenart Hinterbliebenenrente

Verwendung

Verwenden Sie:	Ziel:

Renten

Rentenart:	Um Renten voneinander zu unterscheiden, die im Rahmen der Abrechnung unterschiedlich behandelt werden müssen. Ein Beispiel ist die Unterteilung in die Rentenarten *Eigenrente* und *Hinterbliebenenrente*, wie sie bereits im Standard getroffen ist. Anhand dieser Unterteilung können beide Rentenarten in der Steuerberechnung unterschiedlich behandelt werden
Rententypen:	Um in Subtypen des Infotyps *Rentenbasisbezüge* (0201) einzelne Versorgungsleistungen zusammen erfassen zu können. Ein Beispiel wäre die Aufteilung der Rententypen in: *Firmenrente* mit Rentenart Eigenrente *Firmenrente* mit Rentenart Hinterbliebenenrente *Fremdrente* mit Rentenart Eigenrente

Rentenbasisbezüge (Infotyp 0201)

Im Infotyp *Rentenbasisbezüge* (0201) werden Versorgungsbezüge im Rahmen der betrieblichen Altersversorgung erfaßt.

In der SAP-Standardauslieferung wird Ihnen der Infotyp *Rentenbasisbezüge* (0201) bei Durchführen der Personalmaßnahme *Einstellung* nicht zur Pflege angeboten. Falls Sie in Ihrem Unternehmen bereits bei der Einstellung neuer Mitarbeiter Ansprüche auf Rentenbasisbezüge anlegen möchten, empfiehlt Ihnen SAP den Infotyp *Rentenbasisbezüge* (0201) in die Personalmaßnahme *Einstellung* aufzunehmen.

Informationen hierzu finden Sie im Einführungsleitfaden *Personaladministration* im Kapitel *Anpassung der Arbeitsabläufe → Maßnahmen.*

Rententyp

Der Infotyp *Rentenbasisbezüge* (0201) unterteilt sich in Rententypen. Jeder Rententyp bildet einen Subtyp. Grundsätzlich wird zwischen Rentenbasisbezügen in Form einer Eigenrente und Rentenbasisbezüge in Form einer Hinterbliebenenrente unterschieden. In der SAP-Standardauslieferung sind folgende Rententypen als Subtypen eingerichtet:

- Subtyp 0001: Pensionskassenrenten mit Rentenart Eigenrente
- Subtyp 0002: Pensionskassenrenten mit Rentenart Hinterbliebenenrente
- Subtyp 0005: Firmenrenten mit Rentenart Hinterbliebenenrente
- Subtyp 0006: Firmenrenten mit Rentenart Hinterbliebenenrente

Rentenbasisbezüge

In den Eingabefeldern unter der Überschrift *Rentenbasisbezüge* werden alle relevanten Daten zu einem einzelnen Rentenbasisbezug erfaßt.

Es können pro Rententyp bis zu zwanzig Rentenleistungen entsprechend ihres Ursprunges, Höhe und Kontierung gespeichert werden. Der Infotyp bietet die Möglichkeit die Renten eines Rententyps im Übersichtsbild oder einzeln im Detailbild zu erfassen und zu bearbeiten.

Abrechnung und Auszahlung der Rentenbasisbezüge

Verwendung

In der Personalabrechnung werden die Rentenbasisbezüge aus dem Infotyp *Rentenbasisbezüge* (0201) direkt eingelesen.

Funktionsumfang

Jede einzelne Rente, die abrechnungsrelevant ist, wird mit Lohnart und Betrag in die Verarbeitungstabellen der Abrechnung eingestellt. Beim Einlesen der Renten erfolgt eine Umsetzung des jeweiligen Leistungsträgers in die Kontierungsmerkmale Kostenrechnungskreis, Kostenstelle und Geschäftsbereich.

Versorgungsfreibetrag bei Hinterbliebenenrenten

Die Abrechnungsfunktionalität der Rentenbasisbezüge ermöglicht ein Gewähren von Versorgungsfreibeträgen abhängig von der Rentenart, d.h. in der Regel abhängig davon, ob es sich um Eigen- oder Hinterbliebenenrenten handelt.

Auszahlung von Renten

Die Auszahlung von Renten erfolgt über die Personalabrechnung. Im Abrechnungslauf werden die Daten aus dem Infotyp *Rentenbasisbezüge* (0201) eingelesen und entsprechend verarbeitet.

Die Verarbeitung der Daten zur betrieblichen Altersversorgung ist in die **Personalabrechnung Deutschland** (Personalrechenschema D000) integriert.

In dem Teilschema **Grunddaten Deutschland** (DGD0) werden über die Funktion **P0201** (Einlesen Rentenbasisbezüge) die Daten des Infotypen *Rentenbasisbezüge* (0201) eingelesen.

In Abhängigkeit dieser Daten erfolgt eine Weiterverarbeitung in spezifischen Personalrechenregeln für die betriebliche Altersversorgung. Ausgangspunkt ist im Personalrechenschema **Aliquotierung und Abstellung** (DAL0) die Personalrechenregel **Potentielle in echte Versorgungsbezüge umwandeln** (DR10). In dieser Personalrechenregel werden weitere Verarbeitunsgsschritte anhand von Personalrechenregeln durchgeführt:

- Laufende Versorgungsbezüge verarbeiten (DR11)
- Sonstige Versorgungsbezüge verarbeiten (DR12)
- Versorgungsbezüge mit 1/2 Steuersatz verarbeiten (DR13)
- Mehrjährige Versorgungsbezüge verarbeiten (DR14)

Bei den genannten Personalrechenregeln handelt es sich um Muster, die Sie im Customizing gegebenenfalls Ihren unternehmensspezifischen Bedingungen anpassen müssen.

Hinterbliebenenrenten

Verwendung

Die Ermittlung der Hinterbliebenenrente wird ausgehend vom Erblasser durchgeführt. Die Hinterbliebenen werden automatisch über den Infotyp *Familie/Bezugsperson* (0021) ermittelt. War der Erblasser bereits Rentenbezieher, werden die relevanten Rentenbezüge als Grundlage für die Hinterbliebenenrente herangezogen. War er noch kein Rentenbezieher (Aktiver, unverfallbare Anwartschaften) wird eine fiktive Rente für den Erblasser berechnet und das Ergebnis der relevanten Ansprüche als Grundlage verwendet.

Voraussetzungen

Zur Ermittlung von Hinterbliebenenrenten müssen die berechtigten Hinterbliebenen im SAP-System eingestellt werden. Dabei wird im Infotyp *Familie/Bezugsperson* (0021) eine Zuordnung vom Erblasser zum Hinterbliebenen eingestellt. Die Zuordnung zu einem Hinterbliebenentyp, der die Berechnung und Kürzung der Bezüge steuert, findet über die Mitarbeiterstruktur der organisatorischen Zuordnung des Hinterbliebenen statt.

Funktionsumfang

Die ermittelten Bezüge werden entsprechend eines Regelwerkes für jeden Hinterbliebenentyp gekürzt, wobei auch die Anzahl Hinterbliebener gleichen Typs berücksichtigt werden kann.

Die Hinterbliebenenrenten werden im Infotyp *Rentenbasisbezüge* (0201) für jeden Hinterbliebenen getrennt eingestellt.

Differenzen zur vollen Erblasserrente können über einen bestimmten Zeitraum als Einmalbezug oder wiederkehrender Bezug ausgezahlt werden.

Soll das Aktivengehalt für einen bestimmten Zeitraum an Hinterbliebene weiterbezahlt werden, kann der Beginn der Rentenbezüge um diesen Zeitraum nach hinten verschoben werden.

Rentenanpassungen

Verwendung

Jeder Anspruch definiert, zu welchem Stichtag die aus den Anspruch resultierenden Renten zu überprüfen, bzw. anzupassen sind. Dieses Datum wird erstmalig beim maschinellen Erzeugen eines Rentenbasisbezugs für jede einzelne Rente gefüllt. Ausgehend von dem Datum der nächsten Anpassung werden die Renten selektiert, die innerhalb eines vorzugebenden Zeitraumes angepaßt werden sollen. Ist eine Rente anzupassen, wird neben dem Erhöhungsbetrag auch das neue Anpassungsdatum ermittelt.

Bei einer Rentenanpassung können Erhöhungsbeträge separat ausgewiesen werden und von der Firma, wenn abweichend vom Leistungsträger, übernommen werden.

Funktionsumfang

Das jetzige Verfahren der Rentenanpassung ist ein statisch prozentuales Erhöhen von berechneten Rentenbezügen. Es kann sowohl eine prozentuale Erhöhung als auch eine Erhöhung auf Basis von Jahresindices (z.B. Lebenshaltungskosten Index) durchgeführt werden.

PY-CH Pension Fund

Purpose

This component contains all functions to:

- Calculate employee contributions to the company pension plan
- Calculate benefits (technical account management)
- Create reports

The following information is available for the SAP system context:

- Pension Fund CH: User Guide [Ext.]
  This guide provides user information regarding the *Pension Fund* component.
- Pension Fund CH: Reference Guide [Ext.]
  This guide provides detailed, technical information regarding the individual functions and objects in the pension fund component.
- Pension Fund CH: Technical User Guide [Ext.]
  This guide provides you with tips and strategies for the setup and configuration of the pension fund.

Human Resources Authorization Check

Use

When someone works in the system, the system checks what they are authorized to do. Within the *Human Resources* component you must be able to ensure that access to infotypes and authorization to execute certain human resource transactions can be limited; this is achieved with authorization checks. The system checks the individual user's authorizations in the following areas of *Human Resources*:

- Human resources **infotypes**
- Certain human resources' **transactions**
- **Reporting** within *Human Resources*
- *Human Resource* **cluster**
- **System Settings** in *Human Resources*

Integration

Organizational Management is called up and the authorizations are checked when you work with structural authorization checks.

Features

The following checks are relevant to the *Human Resources* component, and are carried out by the system:

Authorization Checks for Infotypes in Human Resources [Page 366]

Authorization Checks for HR Data Maintenance [Page 367]

Authorization Checks in Reporting [Page 368]

Authorization Checks in the HR Cluster [Page 370]

Authorization Checks in HR System Settings [Page 371]

See also:

Technical Aspects of Authorization Checks [Ext.]

General Authorization Checks

Use

The authorization check for accessing HR infotypes is part of the general authorization check.

Authorizations [Ext.] are described using Authorization Objects [Ext.] An authorization object defines the fields which appear in an authorization. The system checks in user master data if a user has the corresponding authorization for certain specifications in fields.

Authorizations are grouped together in Authorization Profiles [Ext.].

A user's authorizations for the different authorization objects are taken from the authorization profiles assigned to him or her in the user master record.

Activities

You can easily set up authorizations using the Profile Generator [Ext.] in the form of Roles [Ext.]. From a business management view, roles represent an overview of the tasks and activities that someone may carry out in the system. Authorizations are parts of roles and are generated using the Profile Generator. You can generate multiple authorization profiles for each role.

For more information on setting up authorizations and authorization profiles, see the Implementation Guide for *Personnel Administration* under *Maintain Profiles*: *Tools* → *Authorization Administration* → *Maintain Profiles*.

See also:

Time-Dependency of the Authorization Check [Page 372]

Technical Aspects of Authorization Checks [Ext.]

Profile Generator: Automatically Generate Profile [Ext.]

Human Resources Authorization Check

Definition

Fundamental part of the General Authorization Check [Page 362].

The following authorization objects are available in the *Human Resources* component:

- HR*:* Master data (P_ORIGIN)
- HR: Master data - Extended check (P_ORGXX)
- HR: Master data - Check personnel number (P_PERNR)
- HR: User-defined authorization check (P:NNNNN)
- HR: Reporting (P_ABAP)
- HR: Cluster (P_PCLX)
- HR: Transaction code (P_TCODE)

Use

The system checks the authorizations stored in user master data and determines whether a user is permitted to carry out an action or not each time you attempt to execute a business transaction or report.

Structure

The authorization objects in the *Human Resources* component contain (just like the general authorization objects) up to ten fields that are checked by the system during an authorization check.

The *HR: master data* object contains the following fields in the standard system:

INFTY:	Infotype number
SUBTY:	Subtype number
AUTHC:	Authorization level
WERKS:	Personnel area
PERSG:	Employee group
PERSK:	Employee subgroup
VDSK1:	Organizational key

You can, therefore, assign authorizations for personnel data in HR infotypes at the infotype/subtype level according to the employee's *personnel area, employee group, employee subgroup* and *organizational key*.

Authorization Level Field (AUTHC)

All authorization objects in *Human Resources* contain the field *Authorization Level* (AUTHC). You enter the employee's authorization type in this field.

The authorization level can have the following values:

- M Read entry helps
- R Read
- E Write locked data records
- D Maintain lock indicators
- W Write data records
- * All operations

If a user has write authorization, he/she should also have the corresponding read authorization. In other words, if a user has authorization level E,D, or W, he/she should also have the relevant authorizations for level R.

Double Verification Principle:

By using specifications E and D, you can implement the “double verification principle”. This means that at least two users must be involved in writing active records to the database.

Infotype records, except for the records in *Actions* (0000), *Organizational Assignment* (0001), *Personal Data* (0002), *Payroll Status* (0003), *Reference Personnel Number* (0031) infotypes, can have a *lock indicator*. It is displayed when infotype data is edited. The system ignores all data records that have a lock indicator during an evaluation. Records with a lock indicator are described in this documentation as “locked”, and those without a lock indicator as “active”.

For the “double verification principle” to take effect, one of the users must have the specification E in the *Authorization level* field and another user must have the specification D. Specification E permits the user to edit and create locked records, D permits the user to edit the lock indicator (delete or set), that is, a user with specification D can change active records into locked records or visa versa. Active data records can only be written to the database or changed if both users are involved in the processing procedure.

When creating authorizations, make sure that levels E and D are always used in conjunction with level R. The authorizations are not in any specific hierarchical order (only * includes all authorization level values). This becomes clear in a variety of situations.

– Minimum authorization check:

  When you start a personnel administration transaction, the system checks that you have at least a read authorization, i.e. value R or *.

– Time dependency of the check:

You must have an R authorization so that an E or D authorization for the past (just like a write authorization) becomes a read authorization for data records that are valid in the past period specified.

– Reporting:

  You must have an R authorization to display infotype data in reporting (the * authorization includes the R authorization).

Interpretation of Assigned Personnel Number Field (PSIGN)

The authorization object *HR: Master data - Check personnel number* (P_PERNR) relates to the personnel number of an employee. This has an effect on the authorization. The authorization object *HR: Master data - Check personnel number* (P_PERNR) also includes the *Interpretation of assigned personnel numbers* (PSIGN) field. In this field you enter how the system should interpret the assignment user - personnel number.

The field has two possible specifications:

- I One personnel number has more authorizations than another personnel number.
- E The user has no authorizations for their own personnel number.

SAP does not support the specification * and the combination of E and I for this field. You should also not use the ‘ ‘ (Space) specification. Use either E **or** I, or do not enter an authorization at all.

Authorization Checks for Infotypes in Human Resources

Use

Many different authorizations objects are relevant for the authorization checks in the *Human Resources* (HR) component.

In addition to the authorization objects that play a role in other applications and basis functions, the following authorization objects are of particular importance within *Human Resources* for editing infotype data

- *HR: Master data* (P_ORIGIN)
- *HR: Master data - Extended check* (P_ORGXX)

  By using these authorizations objects you ensure that the system checks the combination of assignment and infotype in the authorization checks.
- *HR: Master data - Check personnel number (P_PERNR)*

  The authorizations for this object are exclusively relevant for the personnel number assigned to the user.

You can also set up the system to carry out diverse checks.

Integration

You can include the structural authorization check in the check if your system is integrated with the *Organizational Management* component.

The system checks the organizational assignment during a structural authorization check. The decision about whether or not a user may execute an activity is dependent on whether the personnel number the user wants to access is available with the corresponding organizational assignment.

Authorization Checks for HR Data Maintenance

Use

When a user selects a personnel administration transaction (for editing personal data and not setting up HR system tables), the system performs a **general authorization check**. In order for a user to be able to start a human resources transaction, they must at least have a read authorization for HR infotypes, that is, they must have the indicators **R** or ***** in the *Authorization level* field in the *HR: Master Data* (P_ORGIN) object, for the transaction to be executed.

If a user only has a read authorization for their own personnel number, they also need an R-authorization for the *HR: Master Data* (P_ORGIN) object.

The general authorization check also take place when the main switch for *HR: Master data* (ORGIN) is inactive.

After the user has entered a personnel number for a HR data maintenance transaction, the system checks whether the user has the relevant authorization for the person. If you are authorized to maintain the fields in the *Organizational Assignment* (0001) infotype for which authorization is required for the person and period in question, you can continue processing. Authorization-related fields in the infotype *Organizational Assignment* (0001) are *Personnel Area*, *Employee Group*, *Employee Subgroup* and *Organizational Key*.

If you are authorized to maintain a particular person's data and you perform a user-controlled transaction (menu screens), the system checks that you have the authorization for the infotype/subtype needed to perform the action. This check is carried out after you have entered the infotype/subtype and specified the action. If transactions are system-guided, the system calls up the infotype/subtype instead of you having to enter it yourself. If there is no authorization for an infotype/subtype that is accessed by a system-guided transaction, the system skips it.

If you have authorization for the person and the operation required for the infotype/subtype, the system reads the infotype/subtype records from the database to a buffer. Each infotype/subtype data record in the buffer is assigned an indicator on the basis of organizational assignment data records; this indicator shows the administrator's authorization.

Before an infotype record is saved to the database after editing, the system checks that you have the appropriate authorization. If not, it displays an error message.

Authorization Checks in Reporting

Use

The authorization for starting a report is checked under Object usage *ABAP: Program flow checks* (S_PROGRAM). In individual cases, you can make this check more specific by using additional checks, which are described below.

Features

HR-Reporting

Here, we are referring to reports that use theological database PNP.

HR reports read HR infotype data. For this reason, authorization checks in HR reports run in basically the same way as for the transactions that are used to edit HR infotypes. When you access data in reporting, a the system always checks to ensure that the user has a read authorization, that is, that he or she has value `R` or `*` in the *Authorization level* field. Under certain circumstances, you might require a simpler authorization check in HR reporting.

If an administrator wants to create a list of telephone numbers, then the system should not check each individual person to see if an authorization is available. Instead, the administrator has the authorization to print out the telephone list.

Therefore, in the object *HR: Master Data*, there is the additional object *HR:* Reporting (P_ABAP) If the relevant authorizations exist, then a simpler and as a result quicker check takes place.

The authorization object *HR: Reporting* (P_ABAP) does not affect the authorization to start reports (this controls the above-mentioned object *ABAP: Program execution checks*). It is used for much more than this - it simplifies and accelerates additional individual checks in HR reports, or indeed switches them off entirely. If the user, as a general rule, is permitted to carry out uncritical reports (e.g. creating a list of telephone numbers), then do not assign an authorization for the object *HR: Reporting* (P_ABAP).

The infotype authorization check generally differs from the checks that are executed by the system for the dialog transactions PAnn if you use an HR report authorization for the object HR: Reporting (P_ABAP). In the majority of cases the user has a greater access to data by virtue of having more authorizations if you assign HR reports authorizations to the object *HR: Reporting* (P_ABAP), than they have in the Human Resources transactions.

If a missing authorization prevents you from displaying certain HR data, then all of the data for that particular person is not displayed. At the end of the list, a note tells you how many persons were skipped because of missing authorizations.

Reports that Read HR Clusters

See also:

Authorization Checks in the HR Cluster [Page 370]

Payment Medium Programs

These are programs that do not actually belong to the *Personnel Administration* (HR) area, but can read personal data that is protected. In addition to the check that is run to see whether the user is authorized to start such programs (Object *ABAP: Program execution checks*), a check is run for these programs to see whether the user has the relevant authorization for the object *HR: Reporting*. (P_ABAP).

Authorization Checks in the HR Cluster

Use

Different employee data is stored in the PCLx files (x = 1, 2, 3, 4). The application program usually has access to this data by means of the PCLx buffer (an interface for accessing the HR cluster that is supported by HR). If you try to access PCLx using the PCLx buffer, the system performs and authorization check (cluster authorization).

To check the cluster authorization, the system uses the HR: cluster (technical name: P_PCLX) object. The object is made up of two fields. One field contains the two-character name of the cluster (the name of the cluster determines a data area within the PCLx), the other field describes the authorization type (write, read).

If the system determines during authorization checks that the necessary authorization for a cluster does not exist, then the procedure (read, write, delete) specified for the cluster by the application program is not performed.

We make the following distinctions:

- Read/write

  Read denotes that data is imported from PCLx. Write denotes that data is written to the buffer.

  The system does not read/write PCLx data records for the cluster.

  Technical information: the *MAIN-SUBRC* and *SY-SUBRC* fields are set. *MAIN-SUBRC* = `12`, *SY-SUBRC* <> `0`. These fields can be queried by the application program.

- Delete

  The data records that are to be deleted are first flagged in an internal table by the DELETE_REQUEST routine. By calling up the UPDATE_PERG_BUFFER(SAPUP50R) update routine, the data records flagged in the internal table are deleted.

  The authorization check occurs when the data records are flagged. If no authorization exists, the records for that particular cluster are not flagged for deletion. (Technical information: SY-SUBRC <> `0` then applies.)

  The authorization check does not check the dependencies between different clusters. When assigning authorizations, please ensure that a user has the same authorization for all clusters that are connected to one another. It makes no sense for a user to be able to obtain information from one cluster, but unable to obtain information from one of its connected clusters, because of his or her authorizations.

Authorization Checks in HR System Settings

Use

General authorizations for such things as editing screens, programs, and dictionary objects will not be dealt with in this section. These are general Basis functions and as such will be dealt with within Basis. Here, we want to deal with the operating of the HR System implementation transactions and setting up the tables that play a specific role within *Personnel Administration* (HR Customizing).

Authorization Checks in HR System Settings Transactions

The system checks the operation of HR System implementation transactions, such as editing features and maintaining personnel control records, using the *HR: transaction code* (P_TCODE) authorization object.

Authorization Checks in Table Maintenance and View Maintenance

The system checks the authorization for maintaining tables or views with standard tools using the *Table maintenance* (S_TABU_DIS) object. HR tables are assigned to the *Px* authorization group, where *x* stands for the table's delivery class.

Time-Dependency of the Authorization Check

Use

When an employee undergoes an organizational change, you may want to assign him or her infotype authorizations based on the duration of the organizational assignment. To do so, you can run authorization checks based on a data record's history.

At the start of the year, an employee changes from personnel area 0101 to personnel area 0102. The administrator responsible for processing the employee's personal data in the second personnel area is different from the administrator in the first personnel area. You might want to prevent the administrator who was responsible for the employee in the previous year from accessing data that is entered in certain infotypes in the current year. In this case, you can set up the access authorization for infotype data so that it is dependent on the history of data records in the employee's organizational assignment.

Prerequisites

If you want to carry out a time-dependent authorization check, set the corresponding indicator in the *Indicator for access authorization* field (T582A-VALDT) in the *Infotype: Customer Specific Settings* table (T582A).

Features

The procedure is as follows:

There are three possible cases:

a) The administrator's period of responsibility for the employee starts in the future.

   If the administrator has write authorization for the relevant infotype/subtype, it is extended to all infotype records that are valid within the period of responsibility. Read authorization exists for infotype records that have the same validity period as the period of responsibility, or that precede the period of responsibility.

b) The period of responsibility starts before the current date. However, the end of the period of responsibility does not exceed the maximum specified tolerance before the current date.

   In this case, a write or read authorization is extended over all periods. In other words, there are no restrictions for this administrator in terms of the validity period of the relevant infotype records.

   The tolerance time concept ensures that an administrator can still access the data of an employee who is no longer within his/her responsibility, for a limited period of time. This means that the administrator still has the opportunity to close any open issues once the person has moved.

c) The period of responsibility ends in the past. Even the end that was adjusted to the tolerance time is before the current date.

   In this case, the administrator has no write authorization. Read authorization exists for infotype records that have the same validity period as the period of responsibility.

Time-Dependency of the Authorization Check

See also:

Technical Aspects of Authorization Checks [Ext.]

Test Procedures for Infotypes

Use

You can define whether the system should carry out control checks for infotypes using the test procedure; you can also define those infotypes and their subtypes for which control checks should be carried using the test procedure.

This test procedures function for infotypes is particularly pertinent when the system needs to check the integrity of data entered by employees.

Prerequisites

You define the infotypes, for which the system should carry out a control check in *Personnel Administration* customizing: *Tools* → *Authorization Administration* → *Special Authorizations in Personnel Administration* → *Test Procedures* → *Create Test Procedures* or *Assign Infotypes to Test Procedures*.

You normally process the *Test Procedures* infotype (0130) using a program, not manually. You can use *Report for Time Leveling* (RPTAPPU0). This is a muster report which implements a control for a test procedure for time infotype records that have already been entered.

Example

Mr. Mackintosh enters his own time data in the system. The absence and attendance data should go through a control test procedure. Mr. Mackintosh must have the authority to write to infotypes that are relevant for time recording and must also have the authority to read the Test Procedures infotype (0130). He can only enter time data for the period after it has been released following a test procedure.

Mrs. Wong, who is Mr. Mackintosh's superior, has the authority to write to the infotypes that are relevant for time recording and the infotypes that are relevant for the *Test Procedures* infotype (0130). At the end of a time evaluation period she checks the data using a time evaluation report and releases it. The release date is automatically set to the date at the end of the period checked.

Mr. Mackintosh can not change any data for the previous period.

However, his superior can still change data records that have been released.

See also:

Authorization Management (International) [Page 102]

Test Procedures (Infotype 0130) [Page 103]

Reports in Personnel Administration

Use

There are numerous standard reports in the *Personnel Administration* component. You can use these to access statistical evaluations that read employee data or organizational data and carry out these evaluations.

Features

You can run the following standard reports using the information system for *Personnel Administration*:

- Reports that refer to employee data
  - Task Overview [Page 378]*
  - Anniversaries [Page 380]*
  - Powers of Attorney [Page 382]*
  - Education [Page 384]*
  - Employees who have Entered/Left the Company [Page 386]*
  - Family Members [Page 388]*
  - Birthday List [Page 390]*
  - Vehicle Search List [Page 392]*
  - Telephone Directory [Page 394]*
  - Length of Time in Pay Scale [Page 396]*
  - Proposals for Pay Scale Reclassification [Page 397]*
  - Reference Personnel Numbers [Page 399]*
  - HR Master Data Sheet [Page 401]*
  - HR Master Data Sheet SAPscript
  - Flexible Employee Data [Page 403]*
  - List of Employees
  - Maternity Overview [Page 404]*
- Reports that refer to organizational units
  - Staff Changes [Page 406]*
  - Headcount Developments
  - Nationalities
  - List of Salaries According to Seniority
  - Pay Scale Classification [Page 408]*
- Reports that refer to the age or gender of the employee

  - Statistics: Gender Sorted According to Age [Page 410]*
  - Statistics: Gender Sorted According to Seniority [Page 412]*
- Reports for creating documents for infotype changes
  - Logged Changes in the Infotype Data [Page 416]*
- Reports for creating documents for report starts
  - Log of Report Starts [Page 420]*

You can find the documentation about the reports marked with an * in the relevant sections.

You can read the documentation on the remaining reports when you run the reports.

As well as the predefined reports, you can create your own reports. There are generic reporting tools within the *Human Resources* component to support you whilst creating your own reports. To find out how to create reports, see InfoSet Queries in Human Resources [Ext.].

Activities

To execute standard reports follow the menu path below, starting at the *SAP Easy Access* screen:

- *SAP Menu → Human Resources → Personnel Management → Administration → Info System → Reports*
- *SAP Menu → Information Systems → General Report Selection → Human Resources → Personnel Management → Administration*

Reports per Employee

Use

Using a report based on employees enables you to statistically evaluate data for different employees.

For example, you could display the age structure within your company, education/training data, and data about the number of people leaving your company. The individual reports call up personal data for employees (date of birth, family members). Such data is stored in infotypes and subtypes (for example, the *Powers of Attorney* infotype (0030)). The individual evaluations also access data on personnel actions that have been carried out for employees (hiring and those leaving the company).

Task Overview (Query DATE_MONITOR)

Use

This report enables you to create a list of tasks that an employee has during a selected period.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

Note: You can also use search help *M* (tasks) for selection.

The following fields are available under *Program selections*:

- *Task*
- *Reminder date*
- *Task type*
- *Processing indicator*
- *Administrator for person*

You can restrict the selection according to the entries in the *Monitoring of Tasks* infotype (0019) by making entries in these fields.

Under *Output options*, specify the output format that the system is to use for the list.

Task Overview (Query DATE_MONITOR)

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed.

The list contains the following columns:

- *Task*
- *Reminder*
- *First name*
- *PI* (processing indicator as numerical value)
- *Processing indicator* (text)
- *TT* (task type as numerical value)
- *Task type* (text)
- *PersNo*. (Personnel number)
- *First name*
- *Last name*
- *Comments*

  Note: the list can only display the first line of comments from the *Monitoring of Tasks* infotype (0019).

Activities

You can also edit and import this list. To do so, use the functions available in the SAP List Viewer. For more information on the functions available in the Grid Control variant of the SAP List Viewer, and how to implement them, refer to the documentation on *Introduction to the SAP system* under SAP List Viewer (ALV): Grid Control [Ext.].

Example

You want to know which of your employees are taking maternity leave in the next quarter. Enter the desired period, and restrict the selection by entering 25 in the *Task type* field.

Anniversaries (Query JUBILEE_LIST)

Use

This report creates a list of employees who have a seniority anniversary within a year.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

Under *Period,* you determine the dates or person selection period for which you want to evaluate employee data.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel number that you want to include in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

In the *Anniversary in years* field under *Program selections,* specify which anniversary you want to evaluate. If you use this, you can restrict the selection to certain anniversaries (for example, 01 for first year anniversaries or 10 for a ten year anniversary of years of service)

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

The evaluation results are formatted according to the selected output option. The following columns can be used when formatting the evaluation results:

- *PersNo. (Personnel number)*
- *Last name*
- *First name*
- *Entry*

- *Year*

Example

You want to create a company wide list of all employees who celebrate their ten year anniversary of service within the current year. You delimit the evaluation in the *Anniversary in service years* field with the anniversary desired (=10); the system will then display the employees according to the restrictions you have entered.

Powers of Attorney (Query AUTHORIZATIONS)

Use

This report creates a list describing the powers of attorney of your employees.

It also evaluates the different subtypes of the *Powers of Attorney* infotype (0030).

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Prerequisites

The data that the system is to evaluate is stored in the *Powers of Attorney* infotype (0030).

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

You define the specifications for the education/training data evaluation under *Program selection*. You can also delimit the search to certain entry and leaving types in the *Powers of Attorney* infotype (0030).

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

The evaluation results are formatted according to the selected output option. The following columns can be used when formatting the evaluation results:

- *PersNo*. (Personnel number)

Powers of Attorney (Query AUTHORIZATIONS)

- *Last name*
- *First name*
- *Powers of Attorney*
- *Powers of Attorney Key*
- *OrgUnit* (Organizational unit)
- *Description of the organizational unit*

Education (Query EDUCATION)

Use

This report creates a list describing the education and training of your employees.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Prerequisites

The employee's education and training data (schooling, professional, and further training) must be stored in the *Education* (0022) infotype.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel number that you want to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

You define the specifications for the education/training data evaluation under *Program selection*. You can also delimit the search to certain education/training data. The following fields are available:

- *Cost center*
- *Education and training*
- *School leaving certificate*
- *Type of school*
- *Branch of study*

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed. The following columns can be used when formatting the evaluation results:

- *PersNo.* (Personnel number)
- *First name*
- *Last name*
- *Type of school text*
- *School leaving certificate text*
- *Education/Training text*
- *Branch of study*
- *Institute/Place*
- *Cost center*

Example

You want to find out the number of employees within your company who have an economics degree. You specify the corresponding data in the *Education/Training, School leaving certificates,* and *Branch of study* fields.

Fluctuations (Query FLUCTUATIONS)

Use

You use this report to create a list of people who either left or entered a company for a certain defined time.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Make entries under *Other period* and *Period selection period* to ensure that only employees who have a valid data record in the *Actions* infotype (0000) are selected for the desired period. This infotype has time constraint 1. In other words, an action remains valid until a new action is performed. To ensure that the system can take all employees into account for whom an entry or leaving action was performed in the specified period, you must make entries under *Program selections* (*Entry date* and *Leaving date* fields). Select *Other period*, and do not enter a date.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

Make entries in the *Entry date* and *Leaving date* fields under *Program selections* to define the period in which an entry and/or leaving action was performed.

If you make an entry in either the *Entry date* or the *Leaving date* field, the system selects the employees who have a start date in the selected period for a performed entry or leaving action.

If you make an entry in both fields, the system selects all employees who fulfill the following condition: The start date of an entry action falls within the specified entry period (*Entry date* field) **and** the start date of a leaving action falls within the specified leaving period (*Leaving date* field).

You define the output list form under the section *Further processing options*.

Fluctuations (Query FLUCTUATIONS)

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

The evaluation results are formatted according to the selected output option. The following columns can be used when formatting the evaluation results:

- *PersNo.* (Personnel number)
- *First name*
- *Last name*
- *Entry*
- *Leaving*
- *OrgUnit* (Organizational unit)
- *Description of the organizational unit*

Example

You want to get an overview of the people entering your company based on financial quarters.

Family Members (Query FAMILY_MEMBERS)

Use

This report creates a list of employees who have information about their family members stored in the system.

You determine the employees using the subtype in the *Family/Related Persons* (0021) infotype.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Prerequisites

The data about an employee's family and related persons must be stored in the *Family/Related Persons* infotype (0021).

Features

Selection

You determine what data and who is to be taken into account during the evaluation under *Period*.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

In the *Type of family membership* field; determine the subtype of the *Family/Related Person* infotype (0021). This will then be evaluated. You can delimit the selection to certain subtypes of infotype 0021 (*Family/Related Persons*) - for example, 1 for *Spouse* or 2 for *Child*.

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

The evaluation results are formatted according to the selected output option. The following columns can be used when formatting the evaluation results:

- *Personnel number*
- *Name of employee or applicant*
- *Entry*
- *Family relationship*
- *First name*
- *Last name*
- *Date of birth*

Example

You want to create a list of people who you have to contact in case of an emergency. On the *Type of Family Membership* selection screen, select the *Emergency contact* subtype (=07).

Birthday List (Query BIRTHDAY_LIST)

Use

You use this report to create an overview of employee's birthdays. You can modify such overviews to your own company specific requirements. For example, you can create an overview list for each month, or determine coming anniversary birthdays.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

Determine the type of birthday list that the system should output under *Program selections*.

- Annual overview or monthly overview

  If you want to print such a list, enter data in the fields *Year of birth* or *Birthday* (*within a month/year*).

- List of coming anniversary birthdays

  Should you want to create such a list, there are entries in the *Year of birth* or *Employee's age* fields which assist you.

- List related to key date

  Use the *Date of birth* or *Day and month of birthday* fields to create this list.

- List according to employee gender

  If you want to draw up a gender-specific list of employee's birthdays, enter 1 for men and 2 women in the *Gender key* field.

The following fields are also available:

- *Cost center*
- *Organizational unit*

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed.

The following columns can be used when formatting the evaluation results:

- *PersNo.* (Personnel number)
- *Last name*
- *First name*
- *Entry*
- *Leaving*
- *Date of birth*
- *Day*
- *Birthday* (Birthday within current year)
- *Year*
- *Age*
- Gender
- *Cost center*
- *OrgUnit* (Organizational unit)

Example

You want to generate a list of all employees within a certain cost center whose birthday falls within the next quarter. Select *Other period* under the *Period* section and enter the specific dates for the quarter that is to be evaluated. In the *Cost center* field, enter the appropriate cost center. The system creates a list of birthdays based on cost center.

Car Search (QUERY CAR_SEARCH)

Use

This report creates a list of employee's car license plate numbers.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Prerequisites

The vehicle license plate numbers must be stored in the *Internal Control* infotype (0032).

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

Enter any data you know in the field *License plate number* under *Program selections* or delimit the selection using the *Last name* and/or *First name* fields. You also have the following selection possibilities:

- *Building number*
- *Internal telephone number*
- *Office number*

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed. The following columns can be used when formatting the evaluation results:

- *PersNo.* (Personnel number)
- *First name*
- *Last name*
- *Car license number*
- *Tel* (Telephone number)
- *BuiNo* (Building number)
- *OfficeNo* (Office number)
- *PayArea* (Payroll area)
- *CoCode* (Company code)
- *Cost center* (Cost center)

Example

You create a list of all the car license numbers in your company for company cars. On the selection screen, enter all the personnel numbers that you can access via the selection criteria company car.

Telephone Directory (Report RPLTEL00)

Use

This report allows you to create lists of employee telephone numbers:

- internal lists
- external lists

Prerequisites

To be able to use the whole range of functions provided in this report, you must ensure that communications data is recorded in the following infotypes:

- *Addresses* (0006)
- *Internal Control* (0032)
- *Communication* (0105)

Features

Selection

Under *Key date*, specify whether the communications data from today is to be evaluated, or whether another keydate is to be used.

Specify the employees to be evaluated under *Selection*. You can specify a range of personnel numbers in the *Personnel number* field. You can also make an entry in the *Employment status* field, which will determine which employment status is to be evaluated in the report.

You can define additional *Selection criteria* and *Output options* under *Additional data*.

The fields *Communications numbers* and *Postal code* are available under *Selection criteria*. You can specify the type of connection (such as fax number, telephone number or mobile telephone number) in the *Communications numbers* field. You can limit the selection of external employee numbers by making an entry in the *Postal code* field.

Under *Output options*, select which kind of connection the system is to evaluate:

- *External connections*

  You can further restrict an evaluation of external connections by making entries under *Selection criteria*. The system evaluates all telephone numbers stored in the *Addresses* infotype (0006).

- *Extensions*

  The system evaluates all telephone numbers stored in the *Internal Control* infotype (0032).

- *Internal communications*

  The system evaluates all connections stored in the *Internal Control* (0032) and *Communication* (0105) infotypes.

- *Only known telephone numbers*

The system evaluates all telephone numbers stored in the *Addresses* (0006) and *Internal Control* (0105) infotypes. If you have selected *Internal communications*, the system ignores a flag set in the *Only known telephone numbers* field.

- *With personnel number*

  The personnel numbers of employees are also displayed in the list that is created.

- *With address*

  The addresses of employees are also displayed in the list that is created.

  – internal addresses

    If you select either *Extensions* or *Internal communications*, the internal addresses (office numbers) of employees are also displayed in the list.

  – external addresses

    If you select *External connections*, the external addresses of employees are also displayed in the list.

- *As a directory*

  If you select this option, the system automatically sorts the list according to the last names of the employees. The list is formatted in separate pages, which you can insert into a standard telephone book.

  If you want the results to be in the form of a directory, you can not use the *Sort* search help.

Output

The results of the report are displayed in a list, in accordance with your own selection criteria.

Activities

- You can display more information on lines with there is an > displayed at the end of the line. Select the line, and choose .
- If you want to print the list, choose .

  This takes you to the *Print Screen List* screen. Enter the desired print format, and choose *Continue*.

- If you want to search within the list for a certain name or parts of names, choose .

  This takes you to the *Find* dialog box. Enter the desired character string in the *Find* field, and choose . The results of your search are displayed in a new dialog box.

Time Spent in Pay Scale Group/Level (Report RPLTRF00)

Use

This report displays the pay scale classification together with the length of time spent in the pay scale group/level per employee.

Integration

If your collective agreement stipulates that an employee is moved into a different pay scale group or level on reaching a certain age or after spending a specified amount of time in his/her current pay scale group or level, then you can run the Defaults for Pay Scale Reclassification [Page 397] report (RPLTRF10) to display suggestions for the pay scale reclassification for individual employees.

If you want the system to automatically reclassify your employees once they have reached a certain age or once they have spent a specified amount of time in a pay scale group or level, then you can use the Pay Scale Reclassification According to Age and/or Time Spent in Pay Scale (RPITUM00) to do this.

Prerequisites

The relevant employees must be assigned to a pay scale structure. The employees cannot be directly valuated nor can they be assigned to a pay scale structure.

A valid Basic Pay infotype record (0008) must exist for the relevant employees.

Features

Selection

By making entries under *Selection* and *Further selections* you can determine which employees' pay scale data is displayed.

Output

This report displays the names of the employees in a table together with the following data per employee:

- Personnel number
- Pay scale type, area, group and level
- Date as of which the employee has been in the current classification
- Length of time spent in the current pay scale group or level in years and months

This data is taken from the Basic Pay infotype (0008).

If errors occur, you can also display an error list for each of the employees. To display the error list, choose *List* → *Display error list*.

Defaults for Pay Scale Reclassification (Report RPLTRF10)

Use

This report displays the next standard pay scale reclassification for individual employees. You can use this report to determine whether you have forgotten to reclassify an employee or to determine when and who is due for a reclassification.

Integration

If your collective agreement stipulates that an employee is moved into a different pay scale group or level on reaching a certain age or after spending a specified amount of time in his/her current pay scale group or level, then you can run the Time Spent in Pay Scale Group/Level [Page 396] report (RPLTRF00) to display the current pay scale classification of your employees as well as the length of time spent in the pay scale group or level.

If you want the system to automatically reclassify your employees once they have reached a certain age or once they have spent a specified amount of time in a pay scale group or level, then you can use the Pay Scale Reclassification According to Age and/or Time Spent in Pay Scale (RPITUM00) to do this.

Prerequisites

The relevant employees must be assigned to a pay scale structure. These employees cannot be directly valuated nor can they be assigned to a pay grade structure.

These employees are in a pay scale grouping that is defined as being relevant for automatic reclassification. For more information on how to set up automatic pay scale reclassifications, see Pay Scale Changes in the Compensation Management or the Personnel Administration Implementation Guide.

Features

Selection

By making entries under *Period, Selection* and *Further selections* you can determine which employees' pay scale reclassification is displayed.

Output

This report displays the names of the employees in a table together with the following data per employee:

- Personnel number
- Social insurance or tax number
- Pay scale type, area, group and level
- Period of current classification
- New pay scale group and level
- Period of new classification

This data is taken from the Basic Pay infotype (0008).

This report only specifies a suggestion for reclassification if the date of the next standard pay scale reclassification lies within the validity period of the corresponding pay scale group or level.

You can also display an error list for each of the employees. To display the error list, choose *List* → *Display error list*.

Reference Personnel Numbers (Report RPLREF00)

Use

This report creates a list of reference personnel numbers.

Prerequisites

If an employee in your enterprise has more than one work relationship, you can assign a reference personnel number for each relationship. You can then record this, for example, in the *Actions* infotype (0001) when an employee is hired. You can also create reference personnel numbers in the *Reference Personnel Numbers* infotype (0031) at a later point in time.

If you have assigned a reference personnel number in the *Actions* infotype (0000), the system automatically makes this record available in the *Reference Personnel Numbers* infotype (0031). The report uses data stored in the *Reference Personnel Numbers* infotype (0031).

Features

Selection

You can run the report for any period you choose.

You can also use a payroll period for the report, by selecting *Payroll period*. The *Payroll period* entry screen is then displayed, where you can make entries for the desired payroll period. If you choose *Period* again, you return to the initial report selection screen.

Specify the employees to be selected under *Selection*. The following fields are available:

- Personnel number
- Payroll area
- Pers.area/subarea/cost center
- Employee group/subgroup

You can determine how the selected employees are evaluated, and how the data is output under *Additional data*. Any flags set in this section have the following affect on selection:

- *Group by employee*

  An output list is displayed for each employee.

- *Display detailed information*

  Detailed information in an output list contains the following:

  – EmplStatus (employment status)

  – *Company code*

  – *PersArea* (personnel area)

- *EmplGroup* (employee group)
- *EmplSubg* (employee subgroup)
- CapLevel (capacity utilization level)

- *Highlight changes*

  Changes within an evaluation period are highlighted in a different color.

- *Highlight incorrect data*

  Incorrect data is highlighted in a different color.

- *Display error list*

  An error list, containing the personnel numbers that were not selected, is also displayed.

- *Display statistics list*

  The statistics list is displayed along with the report list. The statistic list displays the following:

  - *Number of selected personnel numbers*
  - *Number of defective personnel numbers*
  - Number of defective table entries

Output

The output takes place in the form of a list in accordance with the indicators that you set.

HR Master Data Sheet (Report RPPSTM00)

Use

This report creates an HR master data sheet for one or more employees.

Prerequisites

You must record all bonuses that do not belong to Basic Pay in form *XP02* in the *Form-Related Control of Wage Types* table (T512E).

If you use standard form *XP02* for the report, you must not make any more modifications.

If you use your own form, you must also make your own entries in the following tables:

- *Form Background* (T512P)
- *Information in Fixed Positions* (T512Q)
- *Form Windows* (T512P)

Features

This report uses data from the following international infotypes:

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)
- *Addresses* (0006)
- *Planned Working Time* (0007)
- *Basic Pay* (0008)
- *Bank Details* (0009)
- *Recurring Payments/Deductions* (0014)
- *Contract Elements* (0016)
- *Family/Related Person* (0021)
- *Education* (0022)
- *Date Specifications* (0041)

Selection

Under *Period*, specify whether data is to be selected from today, or from another date.

Enter the employees for whom the HR master data sheet is to be created under *Selection*.

You can further restrict the selection, under *Further entries*:

- Field *Country grouping* (*default*): Select employees who have an organizational assignment to a country
- Field *Form ID in T512P*: Use standard form, or your own form

- Field *Print one/more page(s)*: How master data sheet is to be printed
- Field *Number of test forms*: whether (and how) test forms are printed

Output

The data is output in accordance with the form you use, and displays the selected infotype fields for each chosen employee.

Flexible Employee Data (Report RPLICO10)

Use

This report displays employee data in a flexible manner. In other words, the report only displays data on employees who meet your own selection criteria.

Features

This report contains up to twenty (20) fields for displaying employee data. This means that you can choose to display personal or organizational data, for example.

Selection

The evaluation is based on key dates. You can record a key date in the *Key date* field. If you select *Other key date*, you can run the report on any other day. In this case, simply enter the required date in the corresponding field.

Specify the personnel numbers to be evaluated under *Selection*.

You can choose the employee data that you want to display under *Further entries*. If you choose *Field selection*, you branch to the *HR Field Selection* screen. You can then choose up to twenty (20) fields from the field catalog in this screen.

Output

The results of the report are displayed as a list in ALV Grid Control Format. The fields selected from the field catalog are displayed in the columns in the sequence specified, along with the relevant data.

Activities

You can also edit and import this list. To do so, use the functions available in the SAP List Viewer. For more information on the functions available in the Grid Control variant of the SAP List Viewer, and how to implement them, refer to the documentation on *Introduction to the SAP system* under SAP List Viewer (ALV): Grid Control [Ext.].

Example

You want to create a list of employees, in which data on basic pay and work schedules is included. Enter the personnel numbers of the employees to be included in the list, and under *Field selection,* choose the fields *Personnel number*, *Work schedule rule*, and *Basic pay*. Run the report. The system creates a list, in which data is displayed in the *PersNo*, *WSRule* and *Total Basic Pay* columns.

List of Maternity Data (Report RPLMUT00)

Use

The list gives an overview of maternity cases stored and the accompanying absences.

Features

You can also output a list of maternity cases that have not yet been reported to the authorities.

Activities

Output unreported maternity cases

To output a list of the unreported maternity cases, select the *Display date reported list* field under *Additional data*.

Reports per Organizational Unit

Use

Reports based on organizational units enable you to evaluate, for example, headcount changes within an organizational unit or within a company. You can also run numerous other reports to give you an overview of organizational data (overview of national distribution, salary, and pay scale structure).

Staff Changes (Query STAFF_CHANGES and Query STAFF_CHANGES2)

Use

This report creates a list of personnel actions that have been carried out for employees for the selected time period.

This report evaluates either the *Actions* infotype (0000), or the *Additional Actions* infotype (0302), depending on the settings made in Customizing for *Personnel Administration*.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Make entries under *Other period* and *Period selection period* to ensure that only employees who have a valid data record in the *Actions* infotype (0000) are selected for the desired period. This infotype has time constraint 1. In other words, an action remains valid for the next day. In this report, you must make entries under *Program selection* (*Date of actio*n field) to ensure that the system identifies all actions with an action start date within the specified period. Select *Other period*, and do not enter a date.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

You define those personnel action types to be evaluated in the field *Action type* under *Program selection*. You can also delimit the selection to certain personnel action types. Furthermore, you must also enter a date or a date selection period in the *Date of action* field, so the system is able to identify all employees, for whom the start date of a performed action falls within the specified period.

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed. The following columns can be used when formatting the evaluation results:

- *PersNo.* (Personnel number)
- *First name*
- *Last name*
- *Entry*
- *Actions*
- *Description of the action type*
- *Start*
- *OrgUnit* (Organizational unit)
- *Description of the organizational unit*

Example

You want to get an overview of all the new employees in your company according to financial quarters. Select *Other period* in the *Period* section and enter the specific dates for the quarter that is to be evaluated. Enter the *Hiring* (=01) in the *Personnel action type* field under the *Program selections* section.

Assignment to Wage Level (Report RPSTRF00)

Use

This report creates a list of the pay scale classification of employees.

Features

The report evaluates the *Basic Pay* infotype (0008) with the *Basic Contract* subtype (0).

Selection

Enter which employees are to be included in the evaluation under *Selection*. The following fields are available:

- *Personnel number*
- *Employment status*

You can determine how the selected data is evaluated under *Additional data*. The following fields are available:

- *Nationality*
- *Country grouping*
- *Pay scale area*
- *Pay scale type*
- *Pay scale group*
- *Pay scale level*
- *New entries in time interval*

  If you want an overview of the pay scale classification of new employees, select this field.

You can also run the report for one gender, or more generically.

Output

The results of the report are displayed in a table.

A separate table is output for each pay scale area. The system uses a separate line for each pay scale type. In a generic report, the list contains the columns *Male*, *Female*, and *Both*. The results are displayed in absolute figures and percentages.

The last column shows how long the employee has spent in this pay scale type.

If a selected employee belongs to more than one pay scale area, the system displays an extra table with all the relevant results for this employee after the separate tables have been displayed. The list also displays how many employees were selected for the report.

If the report could not include certain personnel numbers in the report, the system displays an error list at the end, which contains the relevant personnel numbers, and the reason for rejection.

Reports by Age/Gender

Use

Within an report per organizational unit, you can create statistics that give you of the age or seniority of your employees based on the gender of employees.

Statistics: Gender Sorted According to Age (Query GENDER_PER_AGE)

Use

This report creates a list of employees' age according to gender.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed.

The following columns can be used when formatting the evaluation results:

- *Age*
- *Gender*
- *Number share in %*

Example

You want to know the ages of the men and women in the employee subgroup *Salaried employee*. Enter the employee subgroup *Salaried employee* (=AH) in the *Employee subgroup* field in the *Selection* section.

Statistics: Gender Sorted According to Seniority (Query GEND_P_SENIOR)

Use

This report creates a list of employees' seniority according to gender.

This query is assigned to user group *HR: Personnel Administration* (/SAPQUERY/H2) within the *global area*.

Features

Selection

You determine who is to be evaluated and what data is to be evaluated under the *Period* section.

Note: You can only make an entry in the *Person selection period* if you have selected *Other period*.

In the *Personnel number* field under *Selection*, enter the personnel numbers to be included in the evaluation. If you want to get an overview of many employees, enter the corresponding personnel numbers or the personnel number range in the field *Personnel number* under the *Selection* section. You can also restrict the selection using the following fields:

- *Employment status*
- *Personnel area*
- *Personnel subarea*
- *Employee group*
- *Employee subgroup*

You can delimit the selection to certain lengths of service using the *Length of service* field in the *Program selections* section (for example, 01 for employees who have only worked in your company for one year).

You define the output list form under the section *Further processing options*.

For more information on printing lists, see the *Basis* documentation under *ABAP Workbench (BC-DWB)* → *SAP Query and the Quickviewer* → *SAP Query* → *Application* → Interactive Functions for Further List Processing [Ext.].

Output

Depending on the selected output option, the evaluation results are displayed. The following columns can be used when formatting the evaluation results:

- *Year*
- *Gender*
- *Number*

- *Share in %*

Example

You want to know the percentage of male and female employees for all employees who have acquired 10 years of seniority. Enter 10 years anniversary in the *Length of service* field under the *Further processing options*.

Reports for Creating Documents

Use

With these reports, you can create documents of the following types:

- Documents for infotype changes
- Documents for report starts

Logs of Changes to Infotype Records

Use

You can create a log of all changes that have been made to infotype records. The log contains information on who (which employee) made changes to infotype records, and when.

The following section contains information on how to create a log of changes made to infotype records.

Logged Changes in Infotype Data (Report RPUAUD00)

Use

This report is used to display all changes that were made using infotype change documents (short: change documents [Ext.]).

Prerequisites

So that changes to infotype fields (change, create, delete) are recorded as documents, you must make sure that these fields are maintained in the views *HR Documents: Infotypes to be Logged (V_T585A), HR Documents: Field Group Definition (V_T585B)* and *HR Documents: Field Group Characteristics (V_T585C)*.

An archive can only be displayed if it has been created with Archive Administration (transaction *SARA*).

Features

You can create the following types of documents with this report:

- Long-term documents

  Long-term documents are created for revision purposes. Changes made to infotypes are written to the database or can be archived. Long-term documents remain available until you delete them. The archiving object is called **PA_LDOC**.

  Long-term documents evaluate data according to personnel numbers and infotypes. For this reason, the columns PersNo (personnel number) and Inftyp (infotype) are displayed at the top of the drilldown list.

- Short-term documents

  Short-term documents are stored in the database. The data for short-term documents is selected according to date and time. In contrast to long-term documents, the columns *Date* and *Time* are displayed at the top of the drilldown list.

Selection

Specify the type of documents that you want to create under *Read documents from database*. To specify a document type, set the relevant indicator.

Under *Selection*, specify:

- which transaction classes are to be included in the selection with the relevant indicators
- which employees are to be selected, in the *Personnel number* field
- which data the system is to evaluate, in the *Infotype* field
- whether a specific change date, or a certain interval period is to be considered, in the *Change date* field
- whether you want to display the changes made by a specific user, in the *User name* field

  As a rule, the system reads the data from the database.

If you want additional archived data to be read, select *Read from archive*. Additional selection options are displayed under *Archive selection*:

– Also read from database

The documents currently in the database that belong to the archived data and meet the selection criteria are also displayed.

– Archive selection by user

This takes you to the *Archive Administration: Read Data Selection* screen. Select the required archive.

Specify how the documents are to be output, under *Output options*.

- *Direct output of docs*
- *Output program selections*
- *New page per doc.*

  Only set this indicator if you have selected *Direct output of docs.*.

- Sort

  If you set one of the following indicators, the data is sorted in accordance with the indicators:

  – *Time*

  – *Personnel number*

  – *Infotype*

  – *User*

  – *Default currency*

Output

The results are displayed in accordance with your *Output options*:

- Drilldown list

  If you have not made any selections under *Output options*, the list contains an overview of the documents.

  – Long-term documents

  Thc columns at the head of the long-term documents are always displayed in this sequence*: PersNo (personnel number), Inftyp (infotype), Date, Time, SqNo (sequence number)* and *Changed by*.

  – Short-term documents

  Thc columns at the head of the short-term documents are always displayed in this sequence*: Date, Time, SqNo (sequence number), PersNo (personnel number), Inftyp (infotype),* and *Changed by*.

  – *Display program selections*

  If you have made a selection here, the output is in the form of a drilldown list. The selection options are also output.

- Detail List
  - Documents

    If you have selected *Direct output of docs*, the documents are displayed. The documents contain the information taken from the head of the drilldown table, and details on the changes made in an infotype.

    If you have also selected *New page per doc.*, each document is printed on a separate page.

Logs of Report Starts

Use

You can output the log of report starts that the system creates in the form of a list. For information on how to create this list, refer to Log of Report Starts (Report RPUPROTD) [Page 420].

Log of Report Starts (Report RPUPROTD)

Use

This report creates a list of logs that were created when a report was started.

Prerequisites

Report start logs are only created for a report, if the report is entered in the HR Report Attributes table (V_T599R), and if the *Record at start required online* is flagged.

Features

Selection

The following fields are available:

- *Reports*
- *User*
- *Date*
- *Time*

If you want detailed information to be displayed for each initial log, select *All logs with detail info*.

You can also specify the sort sequence in the selection screen. The following fields are available:

- *Sort: Report*
- *Sort: User*
- *Sort: Date, time*

Output

The standard output displays *Report, Title, User, Date and Time* in the selected sequence.

Activities

You can change the sequence of columns by selecting:

- *Sort: User*
- *Sort: Date*
- *Sort: Report*

You can also access detail info in the output list, by choosing *Select*.

Transfer External HR Master Data

This section tells you how to transfer HR master data records that were created in an external system to the SAP HR System.

Storage Within Personnel Administration (PA-PA)

Use

Within **Personnel Administration** (PA-PA), the storage functions provided by **SAP ArchiveLink** facilitate the use of content servers to store copies of incoming documents, such as employment contracts, appraisals, and employee photos. This enables the Human Resources department to save time and money by managing the personnel file centrally as it increases in size and detail.

If an employee at your enterprise receives a personnel appraisal, for example, the written incoming document can be scanned and then stored. If this employee receives more than one personnel appraisal over time, your ability to access them makes it much easier for you to track his or her development. There is no need to waste time searching through different files stored at various locations.

This improves access to employee data while saving time, money, and storage space.

Prerequisites

Technical Implementation (PA-PA)

An external scanner is used to import written incoming documents into the system. The scanner communicates with **SAP ArchiveLink**. Individual documents are linked directly to an infotype and employee using the personnel number, or they are assigned generally to an employee using the personnel number. The link is created using the document type.

The standard system includes the following document types for Personnel Administration:

Name of document type	Document type	Object type	Document class	Infotype	Subtype**
Retirement pension plan	HRIBENEFIT	PREL	FAX	0053	-
Certificate for child	HRIBESCHKI	PREL	FAX	0021	2
Qualifications	HRICERTIFI	PREL	FAX	0024	-
Color photos	HRICOLFOTO	PREL	FAX	0002	-
Employment contract	HRICONTRAC	PREL	FAX	0016	-
Supplements to employment contract	HRICONTRAD	PREL	FAX	0016	-
Obligation to observe data secrecy	HRIDATASEC	PREL	FAX	0002	-
Appraisal	HRIDATES	PREL	FAX	0019	10
Final certificate for education	HRIDIPLOMA	PREL	FAX	0022	+
Photo of employee	HRIEMPFOTO	PREL	FAX	0002	-

Appraisal	HRIEVALUAT	PREL	FAX	0025	-
Health insurance certificate	HRIHEALTHI	PREL	FAX	0013	-
Personnel master data sheet	HRIMASTERD	PREL	FAX	0002	-
Appraisal	HRIPERAPPR	PREL	FAX	0019	10
Reference	HRIREFEREN	PREL	FAX	0023	-
Resume	HRIRESUME	PREL	FAX	*	-
Social security card	HRISOCIALS	PREL	FAX	0013	-
Registration certificate	HRISTUDID	PREL	FAX	0013	-
Wage tax card	HRITAXCARD	PREL	FAX	0012	-
Certificate of contributions to savings scheme	HRIVL	PREL	FAX	0010	+
Work permit	HRIWORKPER	PREL	FAX	0016	-

In the standard system, these document types are assigned to technical document class FAX (format for scanned incoming documents).

If you do not want to use the SAP standard setting, you can determine the infotypes to which individual document types are assigned. The exact assignment depends on the specific infotypes for which specific document types are stored. In principle, a connection to **SAP ArchiveLink** is available for all Personnel Administration infotypes.

Key to Table:

* The “resume” document type is not set up for specific infotypes because it can be linked to a variety of infotypes.

** When an incoming document is assigned, you can enter the following when specifying the subtype:

+ The subtype must be entered when the incoming document is assigned.

- The subtype must not be specified.

Specific value: a default subtype appears when the incoming document is assigned. It cannot be overwritten.

Preparation and Customizing (PA-PA)

Customizing for **SAP ArchiveLink** is divided into general, cross-application Customizing, and application-specific Customizing for individual **SAP ArchiveLink** scenarios.

General Customizing for SAP ArchiveLink

See: Customizing [Ext.]

Application-Specific Customizing

To make application-specific settings for **SAP ArchiveLink**, call up the Implementation Guide (IMG) for Personnel Administration:

Personnel Administration → Tools → Optical Archiving → Set up Document Types for HR

To set up document types for HR, you assign an infotype, subtype, and object ID to the various document types, as necessary. If you want the *Date* field to be a required entry field, flag it with the **+** sign. The *Authorization* field controls the authorization check that is performed when the document is entered at the scan work center, and when the document is assigned to a document type. To check that the employee has authorization for the infotype linked to the document type in question, select the *Authorization* checkbox.

Personnel Administration recommends that you start the ten-character, alphanumeric, document type ID with **HRIxxxxxxx** (x = characters that you can define as required).

Features

The following application scenarios are supported by **SAP ArchiveLink** within Personnel Administration:

Store for subsequent entry (PA-PA) [Page 425]

Assign then store with bar code (PA-PA) [Page 428]

Store and enter (PA-PA) [Page 431]

SAP recommends that you store employee documents with a bar code. For this reason, the following example illustrates how to **assign then store with bar code**. However, it is also technically possible to store without a bar code (that is, you can use the “assign then store” scenario).

Activities

Storage

Please see “Features”.

Display

You can display documents stored for an employee as follows:

- Display all documents for an infotype assigned to an employee (PA-PA) [Page 435]
- Display all documents for an employee (PA-PA) [Page 436]

Store for Subsequent Entry (PA-PA)

Use

When the “store for subsequent entry” scenario is performed, incoming documents are scanned and then assigned to a document type.

This document type is usually assigned to the personnel administrator responsible. However, it can also be linked to an organizational unit, job, position, or work center.

The scanned document is then forwarded as a mail to the personnel administrator’s inbox. He or she can check the provisional assignment to a document type, and confirm or change the assignment.

Activities

There are two ways of assigning a document to an employee using the “store for subsequent entry” scenario:

- If the document type is assigned to an infotype and just one infotype record exists, the infotype record is displayed directly when document processing continues. If more than one data record exists for the infotype, a list of all data records is displayed. The personnel administrator can then choose the required data record from the list. To link the document to an employee and infotype, he or she chooses *Extras* → *Assign facsimile*.

  Assign document with infotype reference to an employee (PA-PA) [Page 426]

- If the document type is not assigned to an infotype, the *Maintain HR Master Data* screen is displayed when document processing continues. To link the document to an employee, the personnel administrator chooses *Extras* → *Assign facsimile*.

  Assign document without infotype reference to an employee (PA-PA) [Page 427]

Assign Document With IT Reference to EE (PA-PA)

Procedure

If you want to use the “store for subsequent entry” scenario to process a document **with infotype reference** for an employee, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Office* → *Inbox*.

   This takes you to the initial screen of your integrated inbox.

2. Use the appropriate function to choose the list that you require.

   The system displays the employee documents sent to you by the scanning department.

3. Select a document and choose *Document* → *Execute.*

   The *Process Document Type* dialog box is displayed. Check that the document type in this dialog box is correct. You can assign the specified document to a different document type by choosing *Change,* or to another document type by choosing *Create*.

4. Place the cursor on the document type you want to process and choose *Process*.

   The *Enter Personnel Number* dialog box is displayed.

5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.

   If there is just one infotype record, the system immediately accesses the entry screen of the infotype linked to the chosen document type. If the infotype has more than one record, a list of all records is displayed. To access the infotype entry screen, choose the record that you require.

6. Maintain an infotype record for the employee, if required.

7. On the infotype entry screen, choose *Extras* → *Assign facsimile*.

   This takes you to the *Assign Facsimile* dialog box, which contains information on the current assignment, such as the document type, infotype, and personnel number.

8. Enter the date of origin, if necessary, and choose *Continue*.

   The *Confirm Assignment of Facsimile* dialog box is displayed.

9. Confirm the assignment.

   A message informs you that the facsimile has been processed and stored successfully.

10. Save the infotype record, if necessary.

Result

The document is processed and linked to the appropriate infotype record of the employee.

Assign Document Without IT Reference to EE (PA-PA)

Procedure

If you want to use the “store for subsequent entry” scenario to process a document **without infotype reference** for an employee, proceed as follows:

1. On the *SAP R/3 System* screen, choose *Office* → *Inbox*.

   This takes you to the initial screen of your integrated inbox.

2. Use the appropriate function to choose the list that you require.

   The system displays the employee documents sent to you by the scanning department.

3. Select a document and choose *Document* → *Execute.*

   The *Process Document Type* dialog box is displayed. Check that the document type in this dialog box is correct. You can assign the specified document to a different document type by choosing *Change,* or to another document type by choosing *Create*.

4. Place the cursor on the document type you want to process and choose *Process*.

   The *Enter Personnel Number* dialog box is displayed.

5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.

   This takes you to the *Maintain HR Master Data* screen.

6. Choose *Extras* → *Assign facsimile.*

   The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and personnel number.

7. Enter the date of origin, if necessary, and choose *Continue*.

   The *Confirm Assignment of Facsimile* dialog box is displayed.

8. Confirm the assignment.

   A message informs you that the facsimile has been processed and stored successfully.

Result

The document is processed and assigned to the employee.

Assign Then Store With Bar Code (PA-PA)

Use

SAP recommends that you store employee documents with a bar code. For this reason, the following example illustrates how to **assign then store with bar code**. However, it is also technically possible to store without a bar code (that is, you can use the “assign then store” scenario).

Activities

When data is assigned then stored with a bar code, the incoming document is received by the appropriate personnel administrator. He or she enters the employee’s personnel number in the *Maintain HR Master Data* infotype selection screen.

- If the document needs to be assigned to an employee with reference to an infotype, the personnel administrator selects the required infotype and then links the document to the employee and infotype by choosing *Extras* → *Assign facsimile*.

  Assign document with infotype reference to an employee (PA-PA) [Page 429]

- If the document needs to be assigned to an employee without reference to an infotype, the personnel administrator links the document to the employee by choosing *Extras* → *Assign facsimile*.

  Assign document without infotype reference to an employee (PA-PA) [Page 430]

The personnel administrator sticks a bar code on the incoming document, and uses an optical scanner to read the bar code into the system. He or she then forwards it to the scanning department. When the employee document is scanned into the system, the system can use the bar code to assign the document to the employee automatically.

Assign Document With IT Reference to EE (PA-PA)

Procedure

If you want to use the “assign then store with bar code” scenario to process a document with infotype reference for an employee, proceed as follows.

1. Choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Maintain*.

   This takes you to the *Maintain HR Master Data* screen.

2. Enter the personnel number.
3. Select an infotype and choose *Change*.

   This takes you to the entry screen for the infotype you selected.

4. Choose *Extras* → *Assign facsimile.*

   A dialog box is displayed containing a list of document types for the infotype you selected.

5. Place the cursor on the document type you require and choose *Copy*.

   This takes you to the *Assign Facsimile* dialog box, which contains information on the current assignment, such as the document type, infotype, and personnel number.

6. Enter the date of origin and choose *Continue*.

   The *Confirm Assignment of Facsimile* dialog box is displayed.

7. Confirm the assignment.

   A dialog box is displayed that requires you to enter a bar code ID.

8. Stick a bar code on the original document, use an optical scanner to read the bar code into the system, and choose *Continue*.

   A message informs you that the bar code has been assigned successfully.

9. Forward the original document to the scanning department.

   The bar code creates the link between the document and the infotype. When the document is scanned into the system, the scanner reads the bar code ID and then assigns the document to a document type and infotype accordingly.

Result

The document is assigned to an employee and provided with a bar code.

Assign Document Without IT Reference to EE (PA-PA)

Procedure

If you want to use the “assign then store with bar code” scenario to process a document without infotype reference for an employee, proceed as follows.

1. On the *SAP R/3 System* screen, choose *Human resources* → *Personnel management* → *Administration,* and then *HR master data* → *Maintain*.

   This takes you to the *Maintain HR Master Data* screen.

2. Enter the personnel number.

3. Choose *Extras* → *Assign facsimile.*

   The *Document Type* dialog box is displayed.

4. Place the cursor on the document type you require and choose *Copy*.

   The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and personnel number.

5. Enter the date of origin, if necessary, and choose *Continue*.

   The *Confirm Assignment of Facsimile* dialog box is displayed.

6. Confirm the assignment.

   A dialog box is displayed that requires you to enter a bar code ID.

7. Stick a bar code on the original document, use an optical scanner to read the bar code into the system, and choose *Continue*.

   A message informs you that the bar code has been assigned successfully.

8. Forward the original document to the scanning department.

Result

The document is assigned to an employee and provided with a bar code.

Store and Enter (PA-PA)

Use

The only difference between the “store and enter” and “store for subsequent entry” scenarios is that the former requires the administrator to scan the incoming document into the system directly within the Human Resources department. The inbox is not used.

Store for subsequent entry (PA-PA) [Page 425]

Activities

There are two ways of assigning a document to an employee using the “store and enter” scenario:

- Assign document with infotype reference to an employee (PA-PA) [Page 432]
- Assign document without infotype reference to an employee (PA-PA) [Page 434]

Assign Document With IT Reference to EE (PA-PA)

Procedure

If you want to use the “store and enter” scenario to process a document with infotype reference for an employee, proceed as follows.

1. Scan the incoming document into the system.
2. On the *SAP R/3 System* screen, choose *Office* → *Business Documents* → *Documents* → *Move*.

   The system displays a list of presettings.
3. Place the cursor on the required presetting and choose *Edit* → *Choose*.

   A list is displayed of document types defined for this setting.
4. Place the cursor on the appropriate document type and choose *Edit* → *Choose*.

   The system requires you to confirm the scanned document’s assignment to the chosen document type. Confirm the assignment. Once the link has been created, the document is deleted from the scan queue.

   The *Enter Personnel Number* dialog box is displayed.
5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.

   If there is just one infotype record, the system immediately accesses the entry screen of the infotype linked to the chosen document type. If the infotype has more than one record, a list is displayed of all records. To access the infotype entry screen, choose the record that you require.
6. Maintain an infotype record for the employee, if required.
7. On the infotype entry screen, choose *Extras* → *Assign facsimile*.

   This takes you to the *Assign Facsimile* dialog box, which contains information on the current assignment, such as the document type, infotype, and personnel number.
8. Enter the date of origin, if necessary, and choose *Continue*.

   The *Confirm Assignment of Facsimile* dialog box is displayed.
9. Confirm the assignment.

   A message informs you that the facsimile has been processed and stored successfully.
10. If you have made changes, save the infotype record.

Result

The scanned incoming document is processed and linked to the appropriate infotype and employee.

Assign Document Without IT Reference to EE (PA-PA)

Procedure

If you want to use the “store and enter” scenario to process a document without infotype reference for an employee, proceed as follows.

1. Scan the original into the system.
2. Choose *Office* → *Business Documents* → *Documents* → *Store.*

   The system displays a list of presettings.
3. Place the cursor on *HR: Personnel Administration* and choose *Continue.*

   A list is displayed of document types defined for this setting.
4. Place the cursor on the appropriate document type and choose *Choose*.

   The system requires you to confirm the scanned document’s assignment to the chosen document type. Confirm the assignment. Once the link has been created, the document is deleted from the scan queue.

   The *Enter Personnel Number* dialog box is displayed.
5. Enter the personnel number of the employee to whom the document belongs and choose *Continue*.

   This takes you to the *Maintain HR Master Data* entry screen.
6. Choose *Environment* → *Assign facsimile.*

   The *Assign Facsimile* dialog box is displayed containing information on the current assignment, such as the document type and personnel number.
7. Enter the date of origin, if necessary, and choose *Continue*.

   The *Confirm Assignment of Facsimile* dialog box is displayed.
8. Confirm the assignment.

   A message informs you that the facsimile has been processed and stored successfully.

Result

The document is processed and assigned to the employee.

Display all Docs for an IT Assigned to EE (PA-PA)

Procedure

If you want to display a document from a list of documents stored for a particular infotype assigned to an employee, proceed as follows.

1. Choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Display*.

   This takes you to the *Display HR Master Data* screen.
2. Enter a personnel number.
3. Select an infotype.
4. Choose *Display*.

   An infotype record is displayed for the specified employee.
5. Choose *Extras* → *Display specific facsimiles.*

   The system displays a list of all documents stored for the infotype you selected.
6. Select a document and choose *Display facsimiles*.

Result

The selected document is displayed.

Display all Documents for an Employee (PA-PA)

Procedure

If you want to display a document from a complete list of documents stored for an employee, proceed as follows.

1. Choose *Human resources* → *Personnel management* → *Administration*, and then *HR master data* → *Display*.

   This takes you to the *Display HR Master Data* screen.

2. Enter a personnel number.
3. Choose *Extras* → *Display all facsimiles.*

   A list is displayed of all documents stored for the specified employee.

4. Select a document and choose *Display facsimiles*.

Result

The selected document is displayed.

ALE Business Processes in Personnel Administration (PA-PA)

This section describes the ALE business processes included in *Personnel Administration*.

Banks (PA-PA)

Use

The master data stored in the *Human Resources* (HR) application component includes the following information on payments made to employees or applicants:

- Bank country
- Bank key
- Account number
- Payment method

The HR System contains the identifying characteristics and names of these objects. The details are stored in the *Financial Accounting* (FI) application component.

Integration

Technically, the *banks* interface has been decoupled. Data is accessed locally. Consistency checks and input help for banks and payment methods are retrieved from FI.

Prerequisites

The attributes of banks and payment methods that are relevant to HR and available locally in the HR System.

If you require further information on the *Banks* ALE business process, call up the Implementation Guide (IMG) and choose *Cross-Application Components* → *Distribution (ALE)* → *Predefined ALE Business Processes* → *Human Resources* → *HR <-> AC* → Create Bank Data [Ext.].

Objects on Loan/Internal Control (PA-PA)

Use

As part of the master data stored for the *Human Resources* (HR) application component, you can use infotype 0040 *Objects on Loan* to record objects that the employee has borrowed from the enterprise. Infotype 0032 *Internal Control* enables you to store company car data for an employee.

However, you can also choose to record an object on loan or a company car as an object within *Asset Accounting* (FI-AA).

Integration

Technically, the *objects on loan/internal control* interface has been decoupled.

Prerequisites

Integration is active between FI-AA and data stored in the HR System on objects on loan and company cars.

Sales Employee (PA-PA)

Use

Within the master data stored for the *Sales and Distribution* (SD) application component, the sales employee is created as a special business partner. The sales employee processes business transactions within the enterprise.

To maintain the characteristics of a sales employee within *Human Resources*, you use the functions included in the *Human Resources* (HR) application component. The following infotypes contain the characteristics of a sales employee. They are relevant to HR and SD.

- *Actions* (0000)
- *Organizational Assignment* (0001)
- *Personal Data* (0002)
- *Addresses* (0006)
- *Bank Details* (0009)
- *Communication* (0105)
- *Sales Data* (0900)

Integration

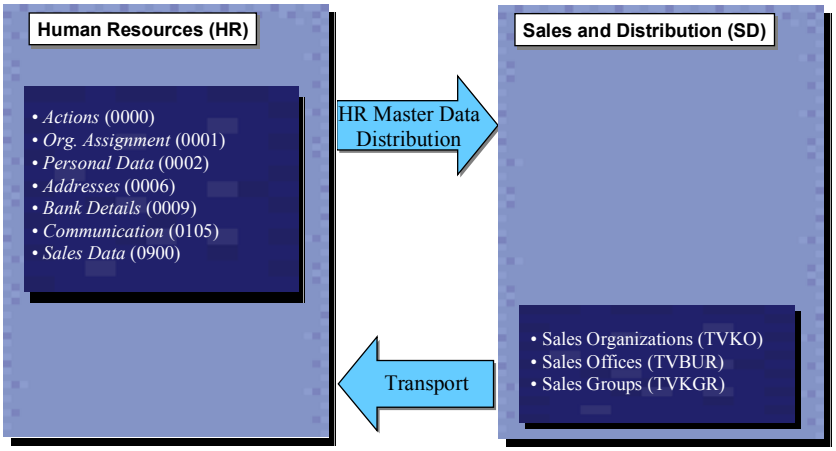
Functions in the *HR System*

In the HR System, SD organizational data (customizing data) can be read locally.

Functions in the *SD System*

In the SD System, sales employee data (HR master data) can be read locally.

Data Flow



If you use the HR and SD application components in different systems at your enterprise, sales employee data is maintained in the HR System and replicated in the SD System using master data distribution [Ext.]. Replicated HR data can then be read locally and evaluated in the SD System.

At the same time, SD data related to the sales employee (sales organization, sales office, sales group) is replicated in the HR System as customizing data. Copy the contents of the following tables from the SD system into the HR system:

- Org. Unit: Sales Organizations (TVKO)
- Org. Unit: Sales Offices (TVBUR)
- Org. Unit: Sales Groups (TVKGR)

The contents of the tables are generally copied when you transport them.

Replicated SD data can then be read locally and evaluated in the HR System.

HR functions enable you to maintain sales employee data. You can maintain sales employees separately in an SD System, or as employees in an HR System. If you maintain sales employees as employees in an HR System, the following data can be read using replication:

Prerequisites

If you implement an HR System and an SD System at your enterprise, HR functions are used in the SD System. Set these functions up in the Customizing system for *sales and distribution*.

If sales employee data is maintained in the HR System and replicated in the SD System to facilitate read access, you must replicate relevant HR data (master data) in the SD System, and SD data (customizing data) in the HR System.

For more information on the Sales Employee ALE business process, see the Implementation Guide (IMG) for Cross-Application Components, by choosing → *Distribution (ALE)* → *Pre-configured ALE Business Processes* → *Human Resource Management* → *HR <-> LO* → Set Distribution of Sales Personnel [Ext.].

Archiving and Deleting Application Data in Personnel Administration (PA-PA)

This section describes how the **PA_LDOC** archiving object is used to archive long-term documents from infotype log creation.

Archiving PA Long-Term Documents (PA-PA)

Definition

Archiving object PA_LDOC is used to archive long-term documents from the creation of the infotype log.

The long-term documents can be for personnel numbers or applicant numbers.

Use

An object of this type consists of all long-term change documents that exist for a personnel number or applicant number in a period that you can define as required. The change documents are stored in table PCL4 in clusters LA (*personnel numbers*) and LB (*applicant numbers*).

When you create the archive, you can choose to archive documents for HR data, applicant data, or both. You can also choose the period for which data is archived. In this respect, the period refers to the date on which the document was written.

The following functions can be used for archiving object PA_LDOC:

- Archive
- Delete

  The standard system settings determine that the deletion program is accessed automatically after data has been archived. In exceptional circumstances, you can use the *Archive* and *Delete* functions separately. In this case, you can start the deletion program as a test run by selecting the *Test run* field on the selection screen. The table entries are not deleted.
- Restore
- Analyze
- Management

Technical Data (PA-PA)

Storage Requirements

The memory space required for an archiving run depends to a great extent on the infotypes for which infotype log creation has been activated in table T585A *Infotypes With Documents* and on the frequency of changes.

If archives are considerably larger than 100 MB, the process of restoring the archive or accessing archived data could take much longer. The extent of this delay depends on the system itself.

Frequency

Archiving frequency also depends to a great extent on the infotypes for which infotype log creation has been activated. You can attain an overview by performing a test archiving run after a specific period of time, such as a month. To do this, create a variant for which the *Test run* option has been set, and the *Detailed log* option has not. Once this run has been performed, you can display the spool list to see how many PCL4 records have been selected. One record consists of approximately 4 KB.

Archiving Runtime

Archiving runtime also depends on many factors, such as the size of individual objects, system load, and the system itself. As a general rule, archiving and subsequent deletion are performed at an approximate rate of 50-100 MB per hour. Please note that this is only a guide.

Application Customizing (PA-PA)

Use

The PA_LDOC archiving object does not require any Customizing settings.

Prerequisites

General Customizing [Ext.] must be performed for archiving. It is used to determine technical values for the archiving run, such as the name, path, and maximum size of the archive file, and the settings for the deletion program.

Archiving Periods and Criteria (PA-PA)

You can archive documents for any period. Infotype logs are an option, which means you can archive documents for the current week. The period for which archiving occurs depends to a great extent on factors such as whether data from the recent past is still used frequently. In this case, you are advised to leave the data in the system. However, if data is rarely needed, you can even archive current data.

Variant Settings for Restoring (PA-PA)

Use

Report RPUAUD00 enables you to display archived data, which means you only need to restore archived data in exceptional circumstances.

However, if you must restore data, you should endeavor to restore a complete archiving run. If this is not possible because of organizational factors, for example, or because there is insufficient space on the database, you can still restore individual archiving objects instead. An archiving object consists of all documents that belong to a personnel number or applicant number in a specific period. As a result, objects are selected by selecting a set of personnel numbers or applicant numbers.

If you restore data partially, data access is considerably slower when data is read in the archive.

Activities

If you select the *Test run* field, the restore program starts as a test run. This prevents data from being written to the database.

If you only want to write some of the data back to the database, you can choose individual or several personnel numbers. You can make a distinction between applicant numbers and personnel numbers.

The system writes the data that was not restored to a new archive. You cannot read or restore the old archive any longer. In this way, the system ensures data consistency.

You must re-archive restored data if you do not want to keep it on the database.

The *Detailed log* option enables you to create a detailed list of processed documents. However, you should only use this option if errors have already occurred that you need to pinpoint because it triggers the creation of an extremely detailed log.

Dependencies (PA-PA)

Long-term documents are archived independently of other archiving programs and objects.

Authorizations (PA-PA)

To edit the PA_LDOC archiving object, you require the P_ARCH_LDOC authorization.

ESS in Personnel Administration

This section documents the use of Employee Self-Services (ESS) in SAP *Personnel Administration*.

Data Entry for Hiring Service

Use

When you hire a new employee in your company, a large amount of data for this employee must be entered into the system.

The *Data Entry for Hiring* service enables the employees at your enterprise to display and edit their own personal data. The initial entry of personal data for new hires is carried out partly by the personnel department and partly by the new employee. In this way, employees can keep their own data up to date and relieve the personnel department of time and cost-intensive activities.

New employees can enter and change their data in this service until the first payroll run.

After the first payroll run, they can only display their data with this service. If the employees want to change their data after the first payroll run, they must call up the relevant service from the *Personal data* menu.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that employees who have no knowledge of the SAP System can also edit their own personal data.

Modification Options

You can determine the entry screens that are to be offered in these services in the HIRE catalog in the *Personnel Management* IMG under *Personnel Management* → *Employee Self Service* → *General Settings for ESS* → *Define Services*.

The service name of this service is PZ15. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

IAC	Development class	Function group	BAPIs
Address	Germany *PB01* Japan *PB22* Canada *PB07* USA *PB10*	Germany *EHD1* Japan *EHJ1* Canada *EHC1* USA *EHU1*	EmployeePriv Address.Change EmployeePriv Address.Create EmployeePriv Address.Delete EmployeePriv Address.Display EmployeePriv Address.Getdetail
Bank Details	Canada *PB07* USA *PB10* Japan *PB22*	Canada *EHC3* USA *EHU3* Japan *EHJ3*	EmployeeBank Detail.Change EmployeeBank Detail.Create EmployeeBank Detail.Delete EmployeeBank Detail.Display EmployeeBank Detail.Getdetail
Emergency Address	Germany *PB01* Japan *PB22* Canada *PB07* USA *PB10*	Germany *EHD1* Japan *EHJ1* Canada *EHC1* USA *EHU1*	EmployeePriv Address.Change EmployeePriv Address.Create EmployeePriv Address.Delete EmployeePriv Address.Display EmployeePriv Address.Getdetail

Emergency Contact	Japan *PB22* Canada *PB07* USA *PB10*	Japan *EHJ6* Canada *EHC6* USA *EHU6*	EmployeeFamily Member.Change EmployeeFamily Member.Create EmployeeFamily Member.Delete EmployeeFamily Member.Display EmployeeFamily Member.Getdetail
Tax deduction form (W-4)	USA *PB10*	USA *EHU2*	EmployeeW4W5 InfoUS.Change EmployeeW4W5 InfoUS.Create EmployeeW4W5 InfoUS.Delete EmployeeW4W5 InfoUS.Display EmployeeW4W5 InfoUS.Getdetail
Family/Related Person	Japan *PB22* Canada *PB07* USA *PB10*	Japan *EHJ6* Canada *EHC6* USA *EHU6*	EmployeeFamily Member.Change EmployeeFamily Member.Create EmployeeFamily Member.Delete EmployeeFamily Member.Display EmployeeFamily Member.Getdetail
Personal Data	Canada *PB07*	Canada *EHC5*	EmployeePersonal Data.Change EmployeePersonal Data.Create EmployeePersonal Data.Delete EmployeePersonal Data.Display EmployeePersonal Data.Getdetailedlist

The service *Entering Data for Hiring* is integrated with the following services:

Data Entry for Hiring Service

- *Address* (permanent residence)
- *Bank Details* (Main bank)
- *Emergency Address*
- *Emergency Contact*
- *Tax deduction form* (W-4) (federal)
- *Entering Family/Related Persons* (spouse)
- *Personal Data*

Displaying/Editing Data Entry for Hiring

Note:

You can enter and change your data with this service until the first payroll run.

After the first payroll run, you can only display your data with this service. You can make further changes to your personal data using one of the services under the *Personal data* service menu option.

Procedure:

1. To enter your hiring data for the first time, choose *Continue.*

   This takes you to the detailed entry screen of the first infotype.

   Enter the relevant data and choose *Next.*

   This takes you to the detailed entry screen of the next infotype.

   Note:

   The system displays all the infotypes for processing, one after another.

   You can also go back to an infotype that has already been edited to enter subsequent data. You do not have to edit the infotypes in the order in which they are presented.

2. To display your hiring data, choose *Continue.*

   This takes you to the detailed entry screen of the first infotype.

   Choose *Next*.

   This takes you to the detailed entry screen of the next infotype.

   Note:

   All the infotypes are displayed for processing, one after another.

You have displayed or edited your hiring data.

Who's Who Service

Use

The *Who's Who* service improves internal communication between employee's and your company. The service enables the user to quickly and simply find out employee's communication data, i.e. telephone number or internet addresses.

The basic communication data is displayed in the intranet is retrieved directly from the data records maintained in the SAP *Personnel Administration* component.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

As enterprises experience steady growth and globalization, their need for efficient internal communication increases.

The *Employee Directory* service satisfies this need by offering R/3 customers and their employees decisive advantages:

- The *Who's Who* service uses data that has usually been maintained already within *Personnel Administration*. This means that you do not have to enter data twice to be able to use this service.
- The *Who's Who* service enables you to use *Personnel Administration* functions that are not provided by other search tools for personal data. For example, *Personnel Administration* allows you to store employee photos as a constituent part of basic personal data. You can then display these photos in the intranet.
- The *Who's Who* service enables your employees to access communication data on **all** employees at the enterprise. It is often the case, for example, that global enterprises do not use a single electronic mail system at all of their international subsidiaries. This means that there is no universal directory of persons for all employees to access. This service enables employees to search for other employees at any international subsidiary.
- The *Who's Who* service enables you to allow third parties, such as partner companies, to access communication data without accessing internal systems.

  To do this, you must set up the appropriate system authorizations, and configure the Internet server so that external companies can get beyond the firewall.

  Display authorizations for certain types of personal data maintained in *Personnel Administration* are only given to specific employees. This means that data in *Personnel Administration* cannot normally be used to search for individual persons. In other words, the *Who's Who* service allows data in *Personnel Administration* to be accessed without enabling employees to display data covered by data protection regulations.

Prerequisites

Authorizations/Security

You can secure this service in a number of different ways by setting up the system authorizations to meet your requirements. All security concepts are based on the standard R/3 authorizations.

There are two security options:

- *Transaction PZ24:* Set up a standard user master record for the *Who's Who* service. A standard user master record is a default user master record with authorization profiles.

  If this security option is active, users are not required to enter an R/3 user ID and password to access this service.

  Use this security measure for the following cases:

  - If you do not want all employees to have access to Employee Self Service, read authorizations for all employees or for the infotypes named below. This could lead to undesired access rights for the *Display HR Master Data* transaction (PA20) in *Personnel Administration* authorizations.
  - If you do not want to restrict access to certain people (e.g. using the Who's Who as kiosk in the reception area for visitors).
  - If all ESS users should have the same access to employee data (no difference).

- *Transaction PZ01:* No standard user master record for the *Who's Who* service is made available.

  If this security option is active, users are required to enter an R/3 user ID and password to access this service.

  Use this security procedure if you want to limit access to this service to certain people or if you want to differentiate between access for ESS users (e.g. structural authorization: employees can only see the people in their own part of their company).

If users want to use the intranet to display communication data and photos, they must have the following authorizations:

- Read authorization for the following infotypes:

  – *Organizational Assignment* (0001)

  – *Personal Data* (0002)

  – *Internal Control* (0032)

  – *Communication* (0105)

  If you require more information, call up the Implementation Guide (IMG) for *Personnel Administration* and choose *Personnel Administration → Tools → Authorization Administration.*

- Read authorization for the optical archive.

  If you require more information, call up the Implementation Guide (IMG) for *Basis Components* and choose *Basis Services → SAP ArchiveLink.*

- Structural authorizations for Organizational Management.

  If you require more information, call up the Implementation Guide (IMG) for *Personnel Administration* and choose *Personnel Administration* → *Tools* → *Authorization Administration.*

Standard Settings and Defaults

If you want to use this service, you must take note of the following:

- You must maintain the following infotypes for each person entered in *Personnel Administration*:
  - *Organizational Assignment* (0001)
  - *Personal Data* (0002)
  - *Internal Control* (0032)
  - *Communication* (0105)
- If you want to use employee photos in this service, for example, you must store them in an accessible area, such as an optical archive linked to the SAP System or on a different server.

Customizing Settings

If you want to use the *Who's Who* service, you must make a number of Customizing settings.

If you require more information, please see Customizing for *Personnel Administration.*

Features

Modification Options

Output in the Internet

Communication data is output via the internet transaction server (ITS). The data is written by the SAP System to the HTTP server. It is then formatted, and displayed using an output screen written in standard HTML format.

You can change the service's screen layout by changing the HTML files on the ITS.

For example, you can adjust the data included in the screen layout, such as cost centers or departments. To do this, show or hide specific fields. You can also include employee photos in the display screen, change the background and text colors, and so on.

If integration between *Personnel Administration* and *Organizational Management* is not active, you must hide the *Org.unit, Job,* and *Position* fields in the screen layout.

Service Name

The service name for this service is PZ24 or PZ01. You can find all of the relevant files under this service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following development objects are relevant to the *Who's Who* service. They must not be changed.

Development class	PBAS
Transaction	PZ24, PZ01
Function group for screen	1065
Function modules	BAPI_EMPLOYEE_GETDATA
BAPIs	EmployeeAbstract.GetList

Searching for Communication Data/Editing Your Own Communication Data

Searching for Communication Data

1. Enter all the information (for example, surname, organizational unit) that you have available on your colleague. If you only know the telephone, fax number or the Internet address of the colleague you are searching for, then search according to those criteria. The search will take longer if you do this, than it would were you to enter and search with different criteria.

   The more precise your restrictions are, the quicker the search will be, and the more precise the results will be. Caution, the number of results that will be displayed is limited to 100.

2. Choose *Find.*

   On the lower left side of the screen, a list of people who meet the search criteria is displayed.

   Note:

   The search criteria can be used separately, or in combination. Using a star (*) or a percentage sign (%) in a user-defined position represents a user-defined character string. Using a plus sign (+) or an underscore (_) or a question mark (?) represents an individual character.

   Example:

   You do not know the exact spelling of a surname when searching for a colleague (*Meier, Meyer, Mejer*).

   In the *Last name* field, enter the letters that you are certain of and insert a '+' (plus) for the letters that you are uncertain of (Me+er).

   The system then lists everyone who matches the search criteria. You can then select the colleague that you were looking for from the list.

   Example:

   You only know your colleague's first name and the first letter of their surname.

   In the *First name* field, enter Thomas and in the *Last name* field, enter **M***.

   The system then lists everyone who corresponds to the search criteria, in other words, everyone whose first name is *Thomas* and whose surname begins with the letter *M*. You can then select the employee you require from this list.

3. Choose the person that you are looking for from the list.

   The selected person's communication data is displayed on the lower right part of the screen.

   c) If you want to call colleagues directly from the *Who's Who* directory, press the icon before the phone number in the field *Direct Call*.

      This takes you to the *Initiate Call* screen.

Note:

This means that instead of searching for and manually dialing the employee's telephone number, you only have to click the mouse a few times.

d) To directly send the person a mail, click on the icon before the Internet address.

e) To see the person's organizational integration, select *Organizational environment*.

This takes you to the separate *Organizational Environment* screen.

Note:

The organizational hierarchy displays the department, position, colleagues, and the selected colleague's superior. From here you can branch into the superior department.

f) Select *Calendar* to see your colleague's calendar.

This takes you to a separate screen called *Calendar for ....* To call up another colleague's calendar, enter their user name and select *New*.

Note:

For detailed information about displaying and editing calendars, see the accompanying documentation.

You have displayed your colleague's communication data.

Caution:

The functions *Change Own Data, Organizational Environment, Calendar* or *Telephone* may have been deactivated in Customizing and therefore are not available.

Editing Own Communication Data

1. Select *Change own data*.

   Your own communication data is displayed on the lower right part of the screen.

2. To complete this task, proceed as follows:

   g) To change or enter your own communication data, correct the current data or enter new data in the corresponding fields, then select *Save*.

   h) If you want to delete part of your communication data, such as a mobile phone telephone number for example, delete the entry from the relevant field, and select *Save*.

   i) Select *Own photo* to attach your photo or to change the one already there for another.

   This takes you to the *My photo* screen. You can select the desired photo using the *Browse* .... function.

   Note:

   The *Preview* function displays the selected photo.

   Choose *Save*.

j) Select *Organizational environment* to see your organizational integration.

This takes you to the separate *Organizational Environment* screen.

Note:

The organizational hierarchy displays your department, position, colleagues and superior. From here you can branch into the superior department.

Caution: You can not alter your own organizational integration.

k) To edit your own calendar, choose *Calendar*.

This takes you to the separate screen *Calendar for ....* You can edit your calendar using the *Create appointment* function. If you want to call up a colleague's calendar, enter their name and select *New*.

Note:

For detailed information about displaying and editing calendars, see the accompanying documentation.

You have edited your own communication data.

Caution:

The functions *Own Photo, Organizational Environment,* or *Calendar* may have been deactivated in Customizing and therefore are not available.

Who's Who

Example 1:

An employee at your enterprise is assigned to a project together with a colleague from a different department. The employee does not know his or her colleague. This service enables the employee to look up the colleague's telephone number, room number, etc.

Example 2:

Employees at your enterprise want to register for an internal training event. To do this, they must specify their cost centers. If the employees do not know which cost centers they are assigned to, they can use this service to look the information up themselves.

Searching for Communication Data

4. Enter all the information (for example, surname, organizational unit) that you have available on your colleague. If you only know the telephone, fax number or the Internet address of the colleague you are searching for, then search according to those criteria. The search will take longer if you do this, than it would were you to enter and search with different criteria.

   The more precise your restrictions are, the quicker the search will be, and the more precise the results will be. Caution: Make sure that the number of results that will be displayed is set to the maximum possible.

5. Choose *Find.*

   On the lower left side of the screen, a list of people who meet the search criteria is displayed.

   Note:

   The search criteria can be used separately, or in combination. Using a star (*) or a percentage sign (%) in a user-defined position represents a user-defined character string. Using a plus sign (+) or an underscore (_) or a question mark (?) represents an individual character.

   Example:

   You do not know the exact spelling of a surname when searching for a colleague (*Meier, Meyer, Mejer*).

   In the *Last name* field, enter the letters that you are certain of and insert a '+' (plus) for the letters that you are uncertain of (Me+er).

   The system then lists everyone who matches the search criteria. You can then select the colleague that you were looking for from the list.

   Example:

   You only know your colleague's first name and the first letter of their surname.

   In the *First name* field, enter Thomas and in the *Last name* field, enter **M***.

   The system then lists everyone who corresponds to the search criteria, in other words, everyone whose first name is *Thomas* and whose surname begins with the letter *M*. You can then select the employee you require from this list.

6. Choose the person that you are looking for from the list.

   The selected person's communication data is displayed on the lower right part of the screen.

   l) If you want to call colleagues directly from the *Who's Who* directory, press the icon before the phone number in the field *Direct Call*.

      This takes you to the *Initiate Call* screen.

      Note:

      This means that instead of searching for and manually dialing the employee's telephone number, you only have to click the mouse a few times.

   m) To directly send the person a mail, click on the icon before the Internet address.

n) To see the person's organizational integration, select *Organizational environment*.

This takes you to the separate *Organizational Environment* screen.

Note:

The organizational hierarchy displays the department, position, colleagues, and the selected colleague's superior. From here you can branch into the superior department.

o) Select *Calendar* to see your colleague's calendar.

This takes you to a separate screen called *Calendar for ....* To call up another colleague's calendar, enter their user name and select *New*.

Note:

For detailed information about displaying and editing calendars, see the accompanying documentation.

You have displayed your colleague's communication data.

Caution:

The functions *Organizational Environment, Calendar* or *Telephone* may have been deactivated in Customizing and therefore are not available.

Personal Data Service

Use

The *Personal Data* service enables the employees in your enterprise to display and edit their own personal data. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that newly hired employees who have no knowledge of the SAP System can also edit their own personal data.

The *Personal data* service has country-specific screens for:

- Argentina
- Australia
- Brazil
- Germany
- France
- Great Britain
- Hong Kong
- Indonesia
- Ireland

- Italy
- Canada
- Malaysia
- Mexico
- New Zealand
- The Netherlands
- Austria
- Philippines
- Portugal
- Singapore
- Spain
- South Africa
- Taiwan
- Thailand
- Venezuela

The screen that appears for a specific employee depends on that employee's assignment to a certain personnel area. If a country other than those listed above uses the HTML template, it receives the French screen as the default. This is because this screen is the most general. Other country-specific screens will be made available in later releases.

Modification Options

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ13. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Argentina *PB 29* Australia *PB13* Brazil *PB37* Germany *PB01* France *PB06* Great Britain *PB08* Hong Kong *PB27* Indonesia *PB34* Ireland *PB11* Italy *PB15* Canada *PB07* Malaysia *PB14* Mexico *PB32* New Zealand *PB43* The Netherlands *PB05* Austria *PB01* Philippines *PB48* Portugal *PB19* Singapore *PB25* Spain *PB04* South Africa *PB16* Taiwan *PB42* Thailand *PB26* Venezuela *PB17*

Function group	Argentina *EHAR5* Australia *EHA5* Brazil *EHB5* Germany *EHD5* France *EHF5* Great Britain *EHG5* Hong Kong *EHH5* Indonesia *EHID5* Ireland *EHL5* Italy *EHI5* Canada *EHC5* Malaysia *EHMY5* Mexico *EHM5* New Zealand *EHNZ5* Netherlands *EHN5* Austria *EHD5* Philippines *EHPH5* Portugal *EHP5* Singapore *EHR5* Spain *EHE5* South Africa *EHW5* Taiwan *EHTW5* Thailand *EHT5* Venezuela *EHV5*
BAPIs	PersData.Change PersData.Create PersData.Delete PersData.Delimit PersData.GetList PersData.GetDetailedList

The *Personal Data* service is integrated with the *Entering Data for Hirings* service.

Displaying/Editing Personal Data

Procedure:

1. To display the current personal data, choose *Display*.

   The system displays your current personal data.

2. To change or add to your current personal data, choose *Change*.

   The system displays a screen with more detail. This allows you to change your personal data, as required.

You have displayed or edited your personal data.

Address Service

Use

An employee's address is often used in conjunction with his or her name in a variety of employee lists and forms, as well as for address labels.

The *Address* service enables the employees at your enterprise to display and edit their own addresses. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

If an employee uses this service to update his or her address data, the old data is automatically delimited. Old HR data is not lost. Instead, it is kept in full so that historical evaluations are possible.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that employees who have no knowledge of the SAP System can also change their addresses.

The *Addresses* service has country-specific screens for:

- Argentina
- Australia
- Brazil
- Denmark
- Germany

- France
- Great Britain
- Hong Kong
- Indonesia
- Ireland
- Italy
- Japan
- Canada
- Malaysia
- Mexico
- New Zealand
- The Netherlands
- Norway
- Portugal
- Sweden
- Switzerland
- Singapore
- Spain
- South Africa
- Taiwan
- Thailand
- USA
- Venezuela

The screen that appears for a specific employee depends on that employee's assignment to a certain personnel area. If a country other than those listed above uses the HTML template, it receives the German screen as the default. This is because this screen is the most general. Other country-specific screens will be made available in later releases.

Modification Options

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ02. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Argentina *PB 29* Australia *PB13* Brazil *PB37* Denmark *PB09* Germany *PB01* France *PB06* Great Britain *PB08* Hong Kong *PB27* Indonesia *PB34* Ireland *PB11* Italy *PB15* Japan *PB22* Canada *PB07* Malaysia *PB14* Mexico *PB32* New Zealand *PB43* The Netherlands *PB05* Norway *PB20* Portugal *PB19* Sweden *PB23* Switzerland *PB02* Singapore *PB25* Spain *PB04* South Africa *PB16* Taiwan *PB42* Thailand *PB26* USA *PB10* Venezuela *PB17*

Address Service

Function group	Argentina *EHAR1* Australia *EHA1* Brazil *EHB1* Denmark *EHDK1* Germany *EHD1* France *EHF1* Great Britain *EHG1* Hong Kong *EHH1* Indonesia *EHID1* Ireland *EHL1* Italy *EHI1* Japan *EHJ1* Canada *EHC1* Malaysia *EHMY1* Mexico *EHM1* New Zealand *EHNZ1* The Netherlands *EHN1* Norway *EHNO1* Portugal *EHP1* Sweden *EHSE1* Switzerland *EHZ1* Singapore *EHR1* Spain *EHE1* South Africa *EHW1* Taiwan *EHTW1* Thailand *EHT1* USA *EHU1* Venezuela *EHV1*

BAPIs	EmployeePrivAddress.Change EmployeePrivAddress.Create EmployeePrivAddress.Delete EmployeePrivAddress.Delimit EmployeePrivAddress.Getdetail EmployeePrivAddress.Getlist EmployeePrivAddress.Getdetailedlist

The *Address* service is integrated with the *Data Entry for Hirings* service.

Country-Specific Features:

- **Japan:** Address Information Service (PY-JP) [Ext.]
- **USA:** Address Information Service (PA-PA-US) [Ext.]

Displaying and Processing Addresses

Note:

The service only displays data records that are currently valid. You can change current or future data. If data has a start date earlier than the last payroll run, it cannot be changed.

If data in the payroll past needs to be changed, you must contact a personnel administrator.

Use the *Address type* field to choose the required subtype (such as *Permanent residence*, *Temporary residence*, *Home address*), and then proceed as follows:

1. To display the current address, choose *Display*.

   The current address is displayed.

2. To change the current address, choose *Change*.

   The system displays a screen with more detail. This allows you to change the address, as required.

3. If data does not exist yet for the address type selected, choose *New* to enter new data.

   The system displays a screen with more detail. This enables you to enter and save the required data.

4. To delete data valid as of the current date or in the future, choose *Delete*.

   The system displays a screen with more detail. You can delete the address here.

You have displayed or edited an address.

Address

Displaying an Address

You want to display the current address of your permanent place of residence. In the *Address type* field, choose the *Permanent residence* subtype. Then choose *Display*.

Changing an Address

You have changed address. To enter the name of the street in which you now live, choose the *Permanent residence* subtype in the *Address type* field. Then choose *Change*, enter the required data, and save.

Entering an Address

Your work commitments require you to live in a different city during the week. You want to enter the address of your future temporary residence now. In the *Address type* field, choose the *Temporary residence* subtype. Then choose *New*, enter the required data, and save.

Deleting an Address

Your enterprise opens a subsidiary near your permanent place of residence. You will work at this subsidiary in the future, which means you need to delete the temporary residence. To delete the address of your temporary place of residence, choose the *Temporary residence* subtype in the *Address type* field. Then choose *Delete*.

Emergency Address Service

Use

The *Emergency Address* service enables the employees at your enterprise to display and edit contact addresses for emergency situations. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

If an employee uses this service to update his or her contact address, the old data is automatically delimited. Old HR data is not lost. Instead, it is kept in full so that historical evaluations are possible.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that employees who have no knowledge of the SAP System can edit their contact addresses for emergency situations.

The *Emergency Address* service has country-specific screens for:

- Argentina
- Australia
- Brazil
- Denmark
- Germany
- France
- Great Britain

- Hong Kong
- Indonesia
- Ireland
- Italy
- Japan
- Canada
- Malaysia
- Mexico
- New Zealand
- The Netherlands
- Norway
- Portugal
- Sweden
- Switzerland
- Singapore
- Spain
- South Africa
- Taiwan
- Thailand
- USA
- Venezuela

The screen that appears for a specific employee depends on that employee's assignment to a certain personnel area. If a country other than those listed above uses the HTML template, it receives the German screen as the default. This is because this screen is the most general. Other country-specific screens will be made available in later releases.

Modification Options

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ05. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Argentina *PB 29* Australia *PB13* Brazil *PB37* Denmark *PB09* Germany *PB01* France *PB06* Great Britain *PB08* Hong Kong *PB27* Indonesia *PB34* Ireland *PB11* Italy *PB15* Japan *PB22* Canada *PB07* Malaysia *PB14* Mexico *PB32* New Zealand *PB43* The Netherlands *PB05* Norway *PB20* Portugal *PB19* Sweden *PB23* Switzerland *PB02* Singapore *PB25* Spain *PB04* South Africa *PB16* Taiwan *PB42* Thailand *PB26* USA *PB10* Venezuela *PB17*

Function group	Argentina *EHAR1* Australia *EHA1* Brazil *EHB1* Denmark *EHDK1* Germany *EHD1* France *EHF1* Great Britain *EHG1* Hong Kong *EHH1* Indonesia *EHID1* Ireland *EHL1* Italy *EHI1* Japan *EHJ1* Canada *EHC1* Malaysia *EHMY1* Mexico *EHM1* New Zealand *EHNZ1* The Netherlands *EHN1* Norway *EHNO1* Portugal *EHP1* Sweden *EHSE1* Switzerland *EHZ1* Singapore *EHR1* Spain *EHE1* South Africa *EHW1* Taiwan *EHTW1* Thailand *EHT1* USA *EHU1* Venezuela *EHV1*

BAPIs	EmployeePrivAddress.Change EmployeePrivAddress.Create EmployeePrivAddress.Delete EmployeePrivAddress.Delimit EmployeePrivAddress.Getdetail EmployeePrivAddress.Getlist EmployeePrivAddress.Getdetailedlist

The *Emergency Address* service is integrated with the *Data Entry for Hirings* service.

Displaying/Editing an Emergency Address

Note:

The service only displays data records that are currently valid. You can change current or future data. If data has a start date earlier than the last payroll run, it cannot be changed.

If data in the payroll past needs to be changed, you must contact a personnel administrator.

Procedure:

1. To display the current address, choose *Display*.

   The current emergency address is displayed.

2. To change the current address, choose *Change*.

   The system displays a screen with more detail. This allows you to change the emergency address, as required.

3. If data does not exist yet, choose *New* to enter new data.

   The system displays a screen with more detail. This enables you to enter and save the required data.

4. To delete data valid as of the current date or in the future, choose *Delete*.

   The system displays a screen with more detail. This allows you to delete the emergency address.

You have displayed or edited an emergency address.

Family/Related Person Service

Use

The *Family/Related Person* service enables the employees at your enterprise to display and edit data about their own family members and related persons. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

If an employee uses this service to update his or her family members and related persons, the old data is automatically delimited. Old HR data is not lost. Instead, it is kept in full so that historical evaluations are possible.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that employees who have no knowledge of the SAP System can edit data about their own family members and related persons.

The *Family/Related Person* service has country-specific screens for:

- Argentina
- Australia
- Brazil
- Germany
- France
- Great Britain

- Hong Kong
- Indonesia
- Ireland
- Italy
- Japan
- Canada
- Malaysia
- Mexico
- New Zealand
- The Netherlands
- Austria
- Philippines
- Portugal
- Singapore
- Spain
- South Africa
- Taiwan
- Thailand
- USA
- Venezuela

The screen that appears for a specific employee depends on that employee's assignment to a certain personnel area. If a country other than those listed above uses the HTML template, it receives the screen for the USA as the default. This is because this screen is the most general. Other country-specific screens will be made available in later releases.

Modification Options

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ12. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Argentina *PB 29* Australia *PB13* Brazil *PB37* Germany *PB01* France *PB06* Great Britain *PB08* Hong Kong *PB27* Indonesia *PB34* Ireland *PB11* Italy *PB15* Japan *PB22* Canada *PB07* Malaysia *PB14* Mexico *PB32* New Zealand *PB43* The Netherlands *PB05* Austria *PB01* Philippines *PB48* Portugal *PB19* Singapore *PB25* Spain *PB04* South Africa *PB16* Taiwan *PB42* Thailand *PB26* USA *PB10* Venezuela *PB17*

Function group	Argentina *EHAR6* Australia *EHA6* Brazil *EHB6* Germany *EHD6* France *EHF6* Great Britain *EHG6* Hong Kong *EHH6* Indonesia *EHID6* Ireland *EHL6* Italy *EHI6* Japan *EHJ6* Canada *EHC6* Malaysia *EHMY6* Mexico *EHM6* New Zealand *EHNZ6* Netherlands *EHN6* Austria *EHD6* Philippines *EHPH6* Portugal *EHP6* Singapore *EHR6* Spain *EHE6* South Africa *EHW6* Taiwan *EHTW6* Thailand *EHT6* USA *EHU6* Venezuela *EHV6*
BAPIs	EmployeeFamilyMember.Change EmployeeFamilyMember.Create EmployeeFamilyMember.Delete EmployeeFamilyMember.Delimit EmployeeFamilyMember.Getdetail EmployeeFamilyMember.Getlist EmployeeFamilyMember.Getdetailedlist

The *Family/Related Person* service is integrated with the *Entering Data for Hirings* service.

Country-Specific Features:

- **Japan:** Family Information Service (PY-JP) [Ext.]

Displaying or Editing Family/Related Person

Note:

The service only displays data records that are currently valid. You can change current or future data. If data has a start date earlier than the last payroll run, it cannot be changed.

If data in the payroll past needs to be changed, you must contact a personnel administrator.

Use the *Family member* field to choose the required subtype (such as *Spouse*, *Divorced spouse*, or *Child*), and then proceed as follows:

1. To display the current family member or related person, choose *Display*.

   The current family member or related person is displayed.

2. To change the current family member or related person, choose *Change*.

   The system displays a screen with more detail. This allows you to change the family member or related person, as required.

3. If data does not exist yet, choose *New* to enter new data.

   The system displays a screen with more detail. This enables you to enter and save the required data.

4. To delete data valid as of the current date or in the future, choose *Delete*.

   The system displays a screen with more detail. This allows you to delete the family member or related person.

You have displayed or edited a family member or related person.

Family/Related Person

Entering Family/Related Persons Data

You have married, and now want to enter your spouse as a member of your family, or as a related person. In the *Family member* field, choose the *Spouse* subtype. Then choose *New*, enter the required data, and save.

Displaying Family/Related Person Data

To display the current member of your family or related person, choose *Display*.

Changing Family/Related Person Data

When checking the member of your family or related person displayed in the system, you discover a typing error. You choose *Change*, and then correct the error.

Deleting Family/Related Person Data

To delete the member of your family or related person, choose *Delete*.

Emergency Contact Service

Use

The *Emergency Contact* service enables the employees in your enterprise to display and edit persons who can be contacted in emergency situations. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

If an employee uses this service to update his or her contact address, the old data is automatically delimited. Old HR data is not lost. Instead, it is kept in full so that historical evaluations are possible.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that employees who have no knowledge of the SAP System can also edit the persons to be contacted in emergency situations.

The *Emergency Contact* service has country-specific screens for:

- Argentina
- Australia
- Brazil
- Germany
- France
- Great Britain
- Hong Kong

- Indonesia
- Ireland
- Italy
- Japan
- Canada
- Malaysia
- Mexico
- New Zealand
- The Netherlands
- Philippines
- Portugal
- Singapore
- Spain
- South Africa
- Taiwan
- Thailand
- USA
- Venezuela

The screen that appears for a specific employee depends on that employee's assignment to a certain personnel area. If a country other than those listed above uses the HTML template, it receives the screen for the USA as the default. This is because this screen is the most general. Other country-specific screens will be made available in later releases.

Modification Options

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ18. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Argentina *PB 29* Australia *PB13* Brazil *PB37* Germany *PB01* France *PB06* Great Britain *PB08* Hong Kong *PB27* Indonesia *PB34* Ireland *PB11* Italy *PB15* Japan *PB22* Canada *PB07* Malaysia *PB14* Mexico *PB32* New Zealand *PB43* The Netherlands *PB05* Philippines *PB48* Portugal *PB19* Singapore *PB25* Spain *PB04* South Africa *PB16* Taiwan *PB42* Thailand *PB26* USA *PB10* Venezuela *PB17*

Emergency Contact Service

Function group	Argentina *EHAR6* Australia *EHA6* Brazil *EHB6* Germany *EHD6* France *EHF6* Great Britain *EHG6* Hong Kong *EHH6* Indonesia *EHID6* Ireland *EHL6* Italy *EHI6* Japan *EHJ6* Canada *EHC6* Malaysia *EHMY6* Mexico *EHM6* New Zealand *EHNZ6* Netherlands *EHN6* Philippines *EHPH6* Portugal *EHP6* Singapore *EHR6* Spain *EHE6* South Africa *EHW6* Taiwan *EHTW6* Thailand *EHT6* USA *EHU6* Venezuela *EHV6*
BAPIs	EmployeeFamilyMember.Change EmployeeFamilyMember.Create EmployeeFamilyMember.Delete EmployeeFamilyMember.Delimit EmployeeFamilyMember.Getdetail EmployeeFamilyMember.Getlist EmployeeFamilyMember.Getdetailedlist

The *Emergency Contact* service is integrated with the *Entering Data for Hirings* service.

Displaying/Editing Emergency Contacts

Note:

The service only displays data records that are currently valid. You can change current or future data. If data has a start date earlier than the last payroll run, it cannot be changed.

If data in the payroll past needs to be changed, you must contact a personnel administrator.

Procedure:

1. To display the current contact person, choose *Display*.

   The current contact person is displayed.

2. To change the current contact person, choose *Change*.

   The system displays a screen with more detail. This allows you to change the contact person, as required.

3. If data does not exist yet, choose *New* to enter new data.

   The system displays a screen with more detail. This enables you to enter and save the required data.

4. To delete data valid as of the current date or in the future, choose *Delete*.

   The system displays a screen with more detail. You can delete the contact person from the system here.

You have displayed or edited a person to contact in emergency situations.

Bank Details Service

Use

An employee's bank details are used for pay and trip expense transfers.

The *Bank Details* service enables the employees in your enterprise to display and edit their own bank details. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

If an employee uses this service to update his or her bank details, the old data is automatically delimited. Old HR data is not lost. Instead, it is kept in full so that historical evaluations are possible.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, only the essential fields are included so that employees who have no knowledge of the SAP System can change their bank details.

The *Bank Details* service has country-specific screens for:

- Argentina
- Australia
- Belgium
- Denmark
- France
- Great Britain

- Ireland
- Italy
- Japan
- Canada
- Malaysia
- New Zealand
- The Netherlands
- Philippines
- Portugal
- Spain
- South Africa
- Thailand
- USA
- Venezuela

The screen that appears for a specific employee depends on that employee's assignment to a certain personnel area. If a country other than those listed above uses the HTML template, it receives the Canadian screen as the default. This is because this screen is the most general. Other country-specific screens will be made available in later releases.

Modification Options

You can activate the following fields in the HTML template:

- *Postal code/City*
- *Payment method*
- *Purpose*
- *Currency*

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ03. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Argentina *PB29* Australia *PB13* Belgium *PB12* Denmark *PB09* France *PB06* Großbritannien *PB08* Ireland *PB11* Italy *PB15* Japan *PB22* Canada *PB07* Malaysia *PB14* New Zealand *PB43* The Netherlands *PB05* Philippines *PB48* Portugal *PB19* Spain *PB04* South Africa *PB16* Thailand *PB26* USA *PB10* Venezuela *PB17*

Function group	Argentina *EHAR3* Australia *EHA3* Belgium *EHBE3* Denmark *EHDK3* France *EHF3* Great Britain *EHG3* Ireland *EHL3* Italy *EHI3* Japan *EHJ3* Canada *EHC3* Malaysia *EHMY3* New Zealand *EHNZ3* The Netherlands *EHN3* Philippines *EHPH3* Portugal *EHP3* Spain *EHE3* South Africa *EHW3* Thailand *EHT3* USA *EHU3* Venezuela *EHV3*
BAPIs	EmployeeBankDetail.Change EmployeeBankDetail.Create EmployeeBankDetail.Delete EmployeeBankDetail.Delimit Employee.Enqueue EmployeeBankDetail.Getdetail EmployeeBankDetail.Getdetailedlist

The *Bank Details* service is integrated with the *Data Entry for Hirings* service.

Country-Specific Features:

- **Japan:** Bank Information in the Internet (PY-JP) [Ext.]

Displaying and Processing Bank Details

Note:

The service only displays data records that are currently valid. You can change current or future data. If data has a start date earlier than the last payroll run, it cannot be changed.

If data in the payroll past needs to be changed, you must contact a personnel administrator.

Use the *Bank details type* field to choose the required subtype (such as *Main bank*, *Additional bank data*, *Travel expenses*), and then proceed as follows:

1. To display the current bank details, choose *Display*.

   The current bank details are displayed.

2. To change the current bank details, choose *Change*.

   The system displays a screen with more detail. This allows you to change the bank details, as required.

3. If data does not exist yet, choose *New* to enter new data.

   The system displays a screen with more detail. This enables you to enter and save the required data.

4. To delete data valid as of the current date or in the future, choose *Delete*.

   The system displays a screen with more detail. You can delete the bank details here.

   Note:

   Use the *Additional bank data* type if a percentage of the wage or salary is paid to a different bank account. In this case, you have two options. You can either specify the maximum value of this percentage in the *Standard value* field, or you can enter the value as a percentage of the total amount in the *Standard percentage* field.

   You can also use the *Standard value* and *Standard percentage* fields for the *Travel expenses* type.

You have displayed or edited a bank connection.

Bank Details

Displaying Bank Details

You want to display your current main bank details. In the *Bank details type* field, choose the *Main bank* subtype. Then choose *Display*.

Changing Bank Details

Your main bank connection has changed. To enter the new bank connection details, choose the *Main bank* subtype in the *Bank details type* field. Then choose *Change*, enter the required data, and save.

Entering Bank Details

You have set up an additional bank connection for trip expenses. To enter the new bank connection details, choose the *Trip expenses* subtype in the *Bank details type* field. Then choose *New*, enter the required data, and save.

Deleting Bank Details

You have closed an additional bank connection that is no longer in use. To delete bank connection details from the system, choose the *Other bank connection* subtype in the *Bank details type* field. Then choose *Delete*.

Previous Employers Service

Use

The *Previous employer* service enables the employees at your enterprise to display and edit data on their own previous employers. In this way, employees can keep their own data up-to-date, while simultaneously reducing the number of time-consuming and expensive activities performed by the Human Resources Department.

If an employee uses this service to update his or her previous employers, the old data is automatically delimited. Old HR data is not lost. Instead, it is kept in full so that historical evaluations are possible.

For further information on Internet Application Components, see ITS Implementation Models [Ext.].

Type of Internet Application Components

Intranet - Employee Self-Service

Prerequisites

There are no restrictions concerning which employees can use this service.

An employee must have an SAP user that is directly linked to his or her R/3 employee master data via the *Communication* infotype (0105).

Authorizations/Security

SAP provides a role containing all the necessary authorizations.

For further information see Setting Up ESS Users [Ext.].

Standard Settings

To set up SAP users, you have to make various settings in Customizing. For further information, see the Implementation Guide (IMG) for *Personnel Management* under *Personnel Management* → *Employee Self-Service*.

Features

In this service, the fields are reduced to their essentials so that employees who have no knowledge of the SAP System can also change data on their previous employers.

Modification Options

You can deactivate fields as required, or change them into display fields (which prevents them from being maintained).

The service name of this service is PZ28. You can find all the relevant data under the service name in the SAP@Web Studio [Ext.].

R/3 Development Objects

The following R/3 development objects are used for this service.

Development class	Australia *PB13*

Function group	Australia *EHA10*

Display and Edit Previous Employers

Procedure:

1. To display data on a previous employer, select the relevant line, and choose *Display*.

   This takes you to a screen containing data on your previous employer.

2. To change data on a previous employer, select the relevant line, and choose *Change*.

   This takes you to a screen with more detail, where you can enter and save the required data.

3. To create data on a previous employer, choose *New*.

   This takes you to a screen, where you can enter and save the required data.

4. To delete data on a previous employer, select the relevant line, and choose *Delete*.

   This takes you to a screen, where you can delete the required data.

You have displayed and/or edited data on your previous employer.

Workflow Scenarios in Pers. Administration (PA-PA)

This section describes how SAP Business Workflow is used in *Personnel Administration*.

Follow-Up Activities For Hiring (PA-PA)

Purpose

The *Follow-Up Activities for Hiring* workflow represents the following process:

After a new employee has been hired, a series of administrative and technical steps must be taken before work commences so that he or she is integrated in the company's organizational structure and infrastructure. Different employees are responsible for different steps.

Process Flow

Such steps could, for example, include the following activities and responsibilities.

The departmental secretary determines the employee's building number and room number, and how the work center should be equipped. The technical department assigns the new employee a telephone number, the PC service group installs the necessary hardware, and the security department issues the ID card.

A work commencement letter is created for the employee automatically. As well as the personal data of the employee that is required, the letter includes the data entered during workflow such as the ID card number, building number, and room number. The work item for printing the letter is sent to the inbox of the employee responsible.

Graphic: Workflow "Follow-Up Activities For Hiring" [Page 509]

Advantages, Improvements, Simplifications

The *Follow-Up Activities for Hiring* workflow facilitates efficient company procedures. It supports and accelerates the process described above in accordance with an enterprise's specific requirements by linking the necessary steps, and sending them automatically to the agent.

Follow-up activities for hiring can be generally applicable and flexible. All of the employees concerned are provided at their work centers with the information they require, taking account of who needs to know what, and when they need to know it. This avoids the duplication of work, and enables you to monitor and cope with time-crunch situations. The coordination of individual steps can be optimized so that, for example, the PC service group is not requested to enter a PC equipment number until the departmental secretary has determined how the work center should be equipped. It is possible to ensure that all new employees are properly informed about their coming work activities.

IDES

The *Follow-Up Activities for Hiring* workflow scenario is included in IDES:

Help → R/3 library → Demo System (IDES) → Cross Application → Follow-Up Activities for Hiring.

Using and Linking to Application Functions (PA-PA)

Features

The *Follow-Up Activities for Hiring* process can be regarded as an example of how workflow technology reflects and facilitates core HR procedures.

It includes employee events that represent important core procedures, such as when an employee is *hired*, or *leaves* the company, or is *reassigned* within an organization.

It also includes the most important infotypes as business objects. As a result, all tasks concerned with the maintenance of employee data can be used within such workflows.

Activities

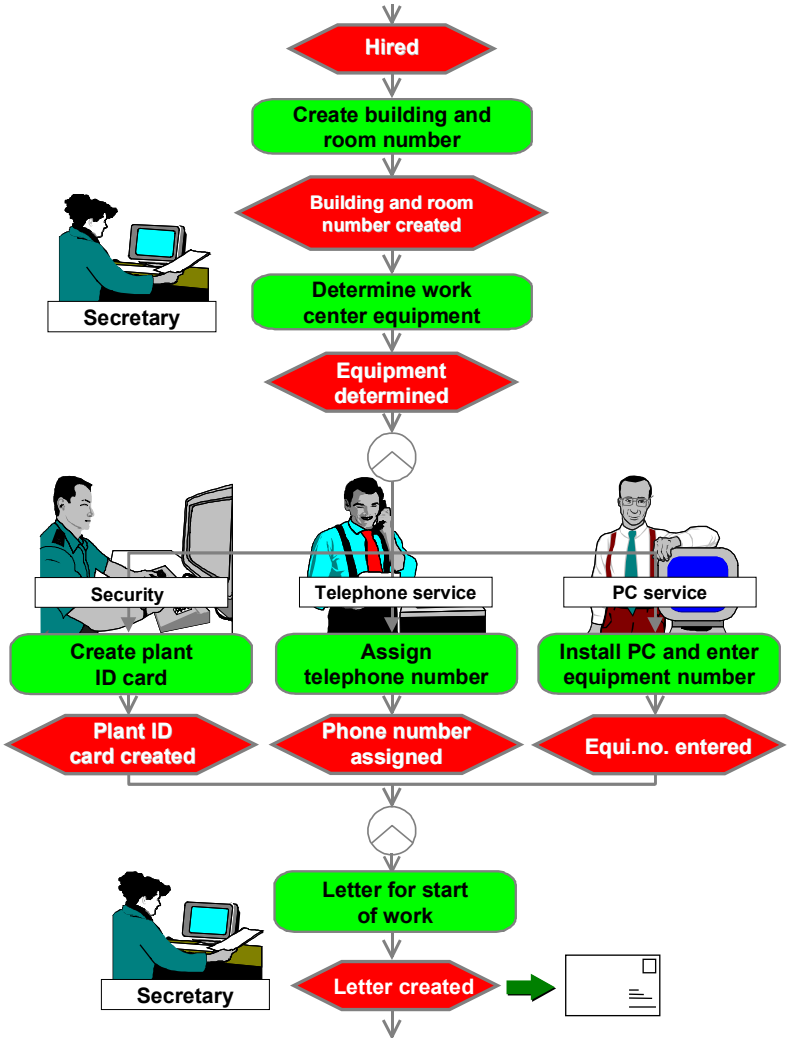
The *Hiring* personnel action (event: *Employee.hired*) triggers workflow automatically. A work item is sent to the inbox of the employee responsible for the administrative or technical task in question. The work item requests the employee to perform the activity.

The fact that a task has been executed outside the system itself (such as when an ID card is issued) is documented by maintaining the appropriate infotype record (in this case, by entering the ID card number in infotype 0032 *Internal Control*).

The work item is removed from the inbox once the infotype has been maintained and processing confirmed.

The work commencement letter is created using a SAPscript document. All data on the *employee* business object can be included in this standard document, including data added to the new employee's master data record during workflow. The work commencement letter is not written to the printer automatically. Instead, it is sent as a concluding work item to the inbox of the person responsible.

Workflow "Follow-Up Activities for Hiring"



ESS - Follow-Up Activities For a New Hire (PA-PA)

Purpose

The *ESS - Follow-Up Activities for a New Hire* workflow represents the following process:

After a new employee has been hired, a series of administrative and technical steps must be taken before work commences so that he or she is integrated in the company's organizational structure and infrastructure.

Implementing **Employee Self-Service (ESS)** enables you to include your new employees directly in this process because they can then maintain some of their HR data themselves. The task of entering HR data for new hires is, therefore, shared between the HR Department and the new employees themselves.

Process Flow

The following activities and responsibilities, for example, are possible:

The system administration department at your enterprise creates an ESS user for the new hire. This provides the employee with the system authorizations required for using the services included in ESS.

At the same time, the new employee is required to supplement his or her HR data in the New Hire Data in the Internet [Page 452] service. Once the employee has entered his or her missing HR data, the appropriate personnel administrator checks that the data entered by the employee is both complete and plausible.

Advantages, Improvements, Simplifications

The *ESS - Follow-Up Activities for a New Hire* workflow facilitates efficient company procedures. It supports and accelerates the process described above in accordance with an enterprise's specific requirements by linking the necessary steps, and sending them automatically to the agent responsible.

It ensures that an ESS user is assigned to each new hire, and that the employee has the system authorizations required for supplementing his or her own HR data immediately after the hiring has taken place. As a result, the employee assumes responsibility for his or her own data just as soon as hiring takes place, and relieves the HR Department of the burden of expensive, time-consuming activities.

The appropriate personnel administrator is responsible for ensuring that data is correct.

Using and Linking to Application Functions (PA-PA)

Features

The *ESS - Follow-Up Activities for a New Hire* process can be regarded as an example of how workflow technology reflects and facilitates core HR procedures.

It includes employee events that represent important core procedures, such as when an employee is *hired*, or *leaves* the company, or is *reassigned* within an organization.

It also includes the most important infotypes as business objects. As a result, all tasks concerned with the maintenance of employee data can be used within such workflows.

By integrating steps that are processed in the web inbox, workflow options are considerably enhanced. These processes can include not only the personnel administrators, but also all of the employees who have an ESS user.

Activities

The *Hiring* personnel action (events: *Employee.hired, Employee.rehired*) triggers workflow automatically.

A work item is sent to the inbox of the system administrator responsible for assigning ESS users. It requests that the new employee be assigned an ESS user. By executing the work item, the system administrator accesses the dialog used to create ESS users. The work item is removed from the inbox once the ESS user has been created, and processing of the work item has been confirmed.

The new hire logs onto ESS with his or her new user. The employee finds a work item in his or her web inbox. It requests that the employee supplements his or her HR data in the New Hire Data in the Internet [Page 452] service. Once the data has been entered, the employee returns to the web inbox and confirms that he or she has supplemented the hire data.

The personnel administrator responsible then receives a work item in his or her inbox. It requests him or her to check the data that has been entered. The personnel administrator now has two options:

- He or she confirms that the data is complete and plausible, which concludes the workflow.
- He or she requests that the data be corrected. The new hire receives a work item in his or her web inbox stating that the data needs to be corrected. Once the employee has corrected his or her HR data, the personnel administrator confirms that the data is complete and plausible, which concludes the workflow.

Delimiting an ESS User (PA-PA)

Purpose

The *Delimiting an ESS User* workflow represents the following process:

Once an employee has left the enterprise, his or her user for **Employee Self-Service (ESS)** must be delimited.

Process Flow

If an employee leaves your enterprise, the system administration department delimits the ESS user of the employee who has left. As of the leaving date, the employee is relieved of the system authorizations required for using the services included in ESS.

Advantages, Improvements, Simplifications

The *Delimiting an ESS User* workflow ensures that every employee who leaves the enterprise is immediately relieved of his or her ESS user. This prevents former employees from misusing ESS.

Using and Linking to Application Functions (PA-PA)

Features

The *Delimiting an ESS User* process can be regarded as an example of how workflow technology reflects and facilitates core HR procedures.

It includes employee events that represent important core procedures, such as when an employee is *hired*, or *leaves* the company, or is *reassigned* within an organization.

It also includes the most important infotypes as business objects. As a result, all tasks concerned with the maintenance of employee data can be used within such workflows.

Activities

The *Leaving* personnel action (events: *Employee.retired, Employee.company.left*) triggers workflow automatically.

A work item is sent to the inbox of the system administrator responsible for delimiting ESS users. It requests that the ESS user of the employee leaving the enterprise be delimited on the leaving date. By executing the work item, the system administrator accesses the dialog used to delimit ESS users. The work item is removed from the inbox once the ESS user has been delimited, and processing of the work item has been confirmed.

Approving an Individual BP Increase (PA-PA) (Obs.)

The *Approving an Individual Basic Pay Increase* workflow is obsolete. Therefore, it is no longer supported by SAP as of Release 4.5A.

Purpose

Processing data on specific employees is a sensitive subject within the R/3 System. For this reason, such data is usually processed centrally by personnel administrators with a special authorization to do so. They collect information on the employee that pertains to master data (such as personal data and payroll data) and working time (such as attendances, absences, and substitutions), and then enter it in the system.

To a certain extent, it is possible for the employees themselves to enter certain types of data in the system. This helps reduce the general administrative burden within the Human Resource department. Data relevant to payroll and future working time, however, must be approved. The employee's superior usually approves such data. Irrespective of this, the data often needs to be checked for plausibility and consistency by an employee with the authority to do so, such as an administrator within the HR department.

The *Approving an Individual Basic Pay Increase* workflow supports and accelerates the procedure described above in accordance with the specific requirements of your enterprise. It does this by linking the necessary approval and verification tasks, and then forwarding them automatically to the appropriate agent.

Process Flow

To reward an employee for commitment or performance by increasing his or her basic pay at a time other than the annual salary review, the employee's immediate superior can use the *Approving an Individual Basic Pay Increase* workflow.

The employee's immediate superior can use this workflow to make a request for an individual basic pay increase. The request is forwarded automatically to all of the persons who are responsible for approving pay increases for this organizational unit. The number of approval levels is unrestricted, which ensures maximum flexibility when you determine the number best suited to your enterprise structure. You can even include the works council in the approval procedure.

The persons involved in the approval procedure can choose between the following courses of action for the request:

- Approve
- Reject
- Postpone

If the request is rejected, the person responsible for the request can either withdraw or change it. If the request passes through all of the approval levels successfully, the increased basic pay record is recorded automatically in the system. Furthermore, the system creates a letter for the employee, informing him or her of the fact that an increase in basic pay has been approved and implemented.

Using and Linking to App. Functions (PA-PA) (Obs.)

The *Approving an Individual Basic Pay Increase* workflow is obsolete. Therefore, it is no longer supported by SAP as of Release 4.5A.

Features

The *Approving an Individual Basic Pay Increase* process can be regarded as an example of how workflow technology reflects and facilitates core HR procedures.

Activities

The following example illustrates how workflow is performed in a single-level approval procedure.

The following persons are all involved in the workflow at various stages:

- The employee's disciplinary superior as the instance responsible for making the request
- The head of the organizational unit as the instance responsible for approving the request
- The personnel administrator as the instance responsible for checking the request

Entering a Request for an Individual Increase in an Employee's Basic Pay

As the person responsible for making the request, the employee's superior retrieves a request form from his or her local PC. The superior enters the name of the employee whose pay should be increased in this form. During the remainder of the procedure, the form accesses the R/3 System directly. Using the employee's name, the employee's current basic pay is taken from infotype 0008 *Basic Pay* and presented to the superior on the form for further processing. To increase the current basic pay, the superior can change existing wage types or create new ones. The superior can then write a note to justify the request.

By choosing *Send*, the request is forwarded to the head of the organizational unit. Sending the request triggers workflow automatically.

Rejecting, Postponing, Approving a Request for an Individual Increase in Basic Pay

As the instance responsible for issuing approval, the head of the organizational unit receives a work item in his or her inbox. The work item requests him or her to check the request.

By executing the work item, the request form is started on the local PC. At the same time, the current data in the request is read to the form. Using tab pages, the head of the organizational unit can compare the employee's current pay with the increased payments that have been requested.

The head of the organizational unit can choose between the following courses of action for the request:

- Reject
- Postpone
- Approve

If the request is rejected, a note can be used to justify the decision, or request a correction for the request.

The Request for an Individual Increase in Basic Pay was Rejected

If the head of the organizational unit does not approve the request, the employee's superior receives a work item in his or her inbox. The work item informs the superior of the fact that the request was rejected. By executing the work item, the superior can display the request form again. Two options are now available:

- **Cancel** the request for an individual increase in basic pay:

  The superior cancels the request, which concludes the workflow.

- **Change** the request for an individual increase in basic pay:

  The superior changes the request according to the wishes of the head of the organizational unit. Once again, the superior can use a note to comment on the correction.

By sending the request, the approval procedure is restarted.

The Request for an Individual Increase in Basic Pay was Postponed

If the head of the organizational unit postpones the request, the superior is informed by mail and asked to resubmit the request on a specific date.

The superior receives a work item in his or her inbox on this date. By executing the work item, the previous request form is displayed with all notes. The superior decides whether to change the request or not, and then sends it again to the head of the organizational unit.

By sending the request, the approval procedure is restarted.

The Request for an Individual Increase in Basic Pay was Approved

If the head of the organizational unit approves the request, a data record containing the pay increase approved for the employee is created in the background for infotype 0008 *Basic Pay*.

If the plausibility and consistency check prevents the infotype record from being created, an error handling work item is sent to the inbox of the personnel administrator responsible for the employee.

By executing the work item, a new data record for infotype 0008 *Basic Pay* is presented to the personnel administrator for online processing. The approved data from the form is available as default values.

The error dialog of infotype 0008 *Basic Pay* helps the personnel administrator perform further processing.

Confirmation

If the infotype record is created, the employee's superior receives a mail in his or her inbox to confirm approval of the pay increase.

If the infotype record could not be created, the employee's superior and the head of the organizational unit are informed by mail. This concludes the workflow.

Informing the Employee

If the infotype record is created, the employee is informed by mail of the approved and implemented pay increase. The letter is not sent to the printer automatically. Instead, it is sent as a concluding work item to the appropriate personnel administrator's inbox. Executing the work item concludes the workflow.