Connecting to SAP CAMPBELL Personnel Administration

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Connecting to SAP CAMPBELL Personnel Administration

Purpose
This component is used to link the personnel administration of StaffWorks (the SAP CAMPBELL Shift Planning System) to SAP HR. In this way, you can then transfer HR master data to the SAP Personnel Administration component. The component provides a log for the uploaded master data, as well as functions for correcting and post-processing data records.
You can also use this component to import HR master data from external systems.

Implementation Considerations
This component is basically an interface between a front-end personnel management system and the SAP HR Personnel Administration component. The interface enables you to perform decentralized personnel actions, as well as to upload any corresponding data for employees to a central SAP HR System for further processing. This requirement exists in many retail stores, for example.

Integration

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Features
- Transfer HR master data from SAP CAMPBELL system. At present, the interface supports the following personnel actions for HR master data records:
  - Hiring
  - Employee organizational changes
  - Employees leaving the company
  - Re-hiring employees
  - Changes to Basic Pay
  - HR Master Data changes
  - Verification of data from sent employees
- Confirming personnel numbers for new employees
- Changing the processing status of HR Master Data
- Recording additional HR Master Data
- Deleting data from the HR Master Data interface

Restrictions
The interface is not recommended for transferring old data as it cannot log infotype history.
Processing External HR Master Data

Purpose
This process allows you to use the SAP interface to transfer HR master data to the SAP HR master record. Do not use this process to transfer legacy data.

This interface contains IDocs for transferring the data and confirming the processing status, interface tables for temporarily storing transferred data in the SAP System, as well as a transaction for post-processing the transferred data. This transaction provides functions for manual or automatic retransfer of data after processing by SAP HR, in addition to functions for error handling.

- Connecting to a decentralized personnel management system
  
  It might be necessary to connect retail stores to the company headquarters within the SAP RETAIL system environment.

  SAP HR is installed in the retail headquarters. SAP CAMPBELL is installed in the retail stores. SAP CAMPBELL offers PC-based programs for HR master data management, shift planning, and time recording. The store manager hires employees and enters or maintains their data.

  During the hiring process, the employee’s name and address is recorded. This data is stored locally, and the HR master record is used for planning shifts and recording working time. In addition, this data is transferred to the central SAP HR System. Additional data can also be entered for these employees in SAP HR, such as contract elements, for example. The central HR master record contains employee data from all stores as well as employees at headquarters. This record is used in both the central human resources and payroll departments.

  This documentation highlights how to use the interface for this application.

- Creating an employee master record
  
  To validate the personnel number in SAP Logistics, the Organizational Assignment (0001) and Personal Data (0002) infotypes must exist first. These two infotypes are the required minimum for an employee master record. If you have not productively implemented SAP HR, but still want to use standard validation, you can automatically create infotypes [Ext.] [Ext.] by applying the HR data using this interface in SAP HR.

Process Flow
1. Data recorded in a SAP CAMPBELL system is transferred to the SAP HR system as an IDoc [Ext.] with the message type HRSM_A. IDoc inbound processing saves the transferred data to an interface table.

2. The data is processed in Personnel Actions [Ext.] in the SAP HR system. Transferring the data from the interface table takes place according to the one of the following setting options made in Customizing:

   - Automatically
     
     During automatic processing, the system writes the data received for each employee to the applicable infotypes of the personnel action for each employee in the background. If errors occur, the following happens:
Processing External HR Master Data

- The system writes an error message to the interface table.
- The employee’s data is not saved in the infotype.
- Processing for the current employee is cancelled, and the next employee’s data is processed.
- Manually

During manual processing [Page 11], the data for the employee to be processed is already located unprocessed in the interface table. The transfer of HR master data is triggered separately for each employee.

3. If an employee’s data causes an error message during processing, it must be manually post-processed.

4. The data transferred from a SAP CAMPBELL system is usually not sufficient to completely process a hiring action. Additional HR master data [Page 21] must be recorded in the central system.

5. If a hiring action is not successfully completed, the system closes the action with the relevant status. You assign the processing status manually [Page 17], according to the degree you want the transferred data to be supplemented or corrected, such as “Transfer data completely and record additional data.”

6. After processing a personnel action, the SAP HR system sends confirmation of the processing status to the SAP CAMPBELL system, using an outgoing IDoc from message type HRSM_B.

   For more information on confirmation IDocs, see Confirming the Processing Status of Personnel Actions [Page 15].

7. Data that was completely transferred, and defective data that the system can process no further can be removed from the interface table using the Reorganization Function [Page 23].

Result

Data recorded in a SAP CAMPBELL system is transferred to the SAP HR system, and can be processed further in HR Processes [Ext.].

You can also record additional employee data not transferred by the SAP CAMPBELL system in SAP HR Personnel Management.
Transferring External HR Master Data

Use

This function allows you to transfer HR master data recorded in a SAP CAMPBELL system to the SAP HR System. External HR master data is transferred to the SAP System as an IDoc, placed into an interface table and processed there in HR [Ext.].

The same validations that occur when master data is entered online in the SAP HR System take place here.

Integration

The transferred data can be further processed using the standard processing options available in Personnel Actions [Ext.].

Prerequisites

- The required Customizing settings must be made for transferring HR master data from external systems in the Interfaces and Integration section of the Implementation Guide (IMG) for Personnel Management.
  - Assigning an external action to an SAP HR personnel action key
  - Determine standard processing for transferred master data
  - Define the number range for unique identification (ID) of employee data in the interface tables
- You have made the required settings in the ALE Customizing section of the IMG for importing IDocs from message type HRSM_A.
- You have made the required settings in the ALE Customizing section of the IMG for exporting IDocs from message type HRSM_B.

Features

This function allows you to do the following:

- Process external HR master data in personnel actions:
  - Hiring [Ext.]
  - Employee Organizational Changes [Ext.]
  - Employees Leaving the Company [Ext.]
  - Employee Re-Entering the Company [Ext.]
  - HR Master Data changes
  - Verification of data from sent employees
  - Changes to Basic Pay [Ext.]
- Process external HR master data manually or automatically (immediately) according to the designated standard processing type
Transferring External HR Master Data

- During manual processing, the uploaded HR master data is located unprocessed in the interface.
- Automatic processing runs as a background job and usually ends with a complete transfer of the data.

If any errors occur during automatic processing, such as when a required entry field in the IDoc is left blank, the data must be transferred manually, and then corrected or changed.

- Save external HR master data automatically in the following infotypes:
  - Actions (0000) [Ext.]
  - Organizational Assignment (0001) [Ext.]
  - Personal Data (0002) [Ext.]
  - Addresses (0006) [Ext.]
  - Bank Details (0009) [Ext.]

Customer Enhancement

You can enhance the HR master data IDoc to include additional customer segments. You can then use the HR master data IDoc with customer segments to transfer data for additional infotypes to the SAP System. Simply assign the name prefix Z1 to the customer-specific segments of the IDoc.

Customer exits are available in the PRSM0001 enhancement for processing the customer segments.

For more information on customer exits, see Introduction to the Enhancement Concept [Ext.].
Transferring HR Master Data Manually

Use

This procedure is used to process the HR master data that were only partially transferred, or not yet transferred for one or one of the following reasons:

- The master data records are available in the interface for manual processing.
- Errors occurred during automatic data transfer

This function also allows you to verify data from temporarily delegated employees. Temporarily delegated employees work on a temporary basis in a department other than their master department. The following data is verified:

- SAP HR personnel number
- First and last name
- Date of birth

Prerequisites

Data was imported to the interface.

Procedure

To manually transfer master data from a SAP CAMPBELL system in the Personnel Administration screen, proceed as follows:

1. Choose Tools → External human resources master data
   
   The screen for specifying selection criteria for external human resources master data appears.

2. Choose the processing type Edit.

3. Choose the desired selection options.
   
   If you do not enter any restrictions, the system selects data records for all personnel areas, external actions and processing statuses.

4. Choose Execute.
   
   A subscreen appears displaying external HR master data records grouped according to personnel areas in an overview tree. Icons, traffic light colors, and comment lines indicate the current processing status of each of the data records.

5. Choose a personnel number or an employee name with one of the following statuses:

   - New employee data for manual processing
   - Error during automatic processing of external employee data
   - Employee HR master record created
   - Transferred data still incomplete and additional data completely recorded
   - Data for temporarily delegated employees not yet verified
Transferring HR Master Data Manually

Data relating to this employee is displayed on tab pages, with each tab page representing a different infotype.

6. Choose the Accepted transferred data function.

If you are not verifying data for temporarily delegated employees, the system displays a dialog box with the following further processing options:

- Show all screens
  The system displays all screens for each existing infotype. You must then save each individual infotype when processing.
- Show errors only
  The system then only displays screens with infotype errors. You only have to correct and save defective infotypes when processing. All transferred infotypes without errors are saved automatically by the system in the background.

b) If you use this function to verify data for temporarily delegated employees, the result of the verification is displayed at the end of the processing stage.

- Without errors
  The selected employee matches the check criteria: there is a relevant master data record and a valid external personnel ID for this personnel number. The employee is displayed in the overview tree with a green icon.
- Defective
  The selected employee does not match the check criteria: there is no relevant master data record and/or no valid external personnel ID for this personnel number. The employee is displayed in the overview tree with a stop sign.

7. Edit the infotypes displayed and save your entries.

If you cancel the transfer of individual infotypes, you must repeat the personnel action at a later time by choosing the Accept transferred data function again.

Result

You have now completely or partially transferred external HR master data records. The data record is displayed in the overview tree with Employee HR master record created.

If necessary, you can change the processing status manually. For more information, see Changing Processing Status for External HR Master Records [Page 18].

b) You have successfully verified the data of a temporarily delegated employee.

For more information, see:

Recording Additional HR Master Data [Page 21]
Assigning Personnel Numbers During Hiring Actions in SAP CAMPBELL

You must be aware of the following when performing a hiring action in retail stores:

External Number Assignment

Although external number assignments are supported technically, they are not recommended, as the administrative work involved is no longer reasonable due to the increasing number of such stores.

Internal Number Assignment

SAP recommends that you should try to perform internal number assignments. For this reason, the SAP CAMPBELL environment simply assumes that an internal number assignment is to be performed.

An employee has one SAP HR personnel number, which is then used in all stores. If an employee is temporarily delegated from his/her master center to another store, you must use the SAP HR personnel number to upload his/her time data.

For more information on the maintenance of number range intervals for personnel numbers, refer to the IMG for Personnel Administration, under Basic Settings.

For more general information on the hiring process, refer to Hiring a New Employee [Ext.].

Process Flow for Internal Number Assignments

1. An employee is hired to work in a store, and is assigned a local personnel number. The SAP HR personnel number is not yet available.

2. The store assigns a unique key that is used to identify the data belonging to the new employee. This external form of identification, for example, can be a combination of the store’s ID and the local personnel number, or may also be the social insurance number of the employee (usually the case in the USA).

3. The store transfers the hiring data, along with this identification key, to the SAP HR system (inbound IDoc).

4. The SAP HR personnel action “Hiring” is then processed. Once the data has been processed successfully, SAP HR assigns a personnel number to the employee.

5. SAP HR then returns a confirmation IDoc, along with the SAP CAMPBELL external identification and the new, internal SAP HR personnel number to the SAP CAMPBELL system. The SAP CAMPBELL system uses the external number to identify the employee concerned. The SAP HR personnel number is then always used in all other forms of future communication with SAP.
If more than one employee is hired at the same time (automatic processing), the outbound confirmation IDoc contains the numbers of all new employees.

If more than one hiring action is processed manually, an outbound IDoc is created for each personnel number.
Confirming the Processing Status of Personnel Actions

**Use**

SAP HR uses this function to send a confirmation IDoc from message type HRSM_B to the SAP CAMPBELL system for each personnel action that was either uploaded from SAP CAMPBELL, or successfully processed in the SAP HR system. This procedure usually runs automatically.

You must, however, manually start the function if errors occur when the IDoc is created automatically. Errors may occur, if, for example, the ALE Distribution Model has not been maintained correctly, which may result in the message type not being found.

**Prerequisites**

A personnel action uploaded from SAP CAMPBELL has been processed successfully.

**Features**

In those cases where errors occurred when Idocs were created, you have the following options when starting the function manually:

- You simultaneously send IDocs to the SAP CAMPBELL system for all personnel actions for which a confirmation of successful processing is available at this time. An IDoc is sent to each company.
- Choose a personnel action for which you want to send an IDoc to the SAP CAMPBELL system to confirm that processing has been successfully completed.

In the case of Hiring actions, the SAP HR personnel number is only transferred to the company once the confirmation IDoc has been sent and received. From this point on, this personnel number is used for every upload and download for this employee.

For more information, see Assigning Personnel Numbers During Hiring Actions in SAP CAMPBELL [Page 13].

**Activities**

Choose one of the following options for transferring external HR master data:

- *Employees → Send confirmation for all personnel actions*
- *Employees → Send confirmation for a personnel action* (after selecting an entry in the overview tree)

- If you choose the option for manually sending an IDoc for all personnel actions, the system compiles all personnel actions in one logical system (individual retail stores) into one IDoc.
- In the hierarchy structure for the interface, entries for the hiring action are indicated with icons that show whether a confirmation IDoc was sent (green checkmark icon) or not (letter icon).
Changing the Processing Status of HR Master Data

Use

A hiring action is processed in two steps - on a retail store level, and on the headquarters level. When the processing status is set, the administrator in the head office confirms that each individual step has been completed, and that a personnel action has been processed fully.

Certain processing statuses cannot be automatically assigned during a hiring action. In these cases, an enterprise-specific decision must be made. Each enterprise can specify which infotypes are required to process a hiring action fully. The personnel administrator manually assigns the status. This function is recommended in the following situations:

- After a complete manual transfer of data
- After completely recording additional data required to fully carry out the personnel action.

The following processing statuses cannot be manually changed using this function:

- Error during automatic processing of external employee data
- New employee data
  
  You can edit data records with one of these statuses using the function for transferring external HR master data records.

- Transferred data could not be processed
  
  Use the Reorganize function to process data with this status.

Prerequisites

SAP CAMPBELL data has been transferred and has one of the following statuses for post-processing in the interface:

- Employee HR master record created
- All data transferred completely; additional data still to be recorded
- Transferred data still incomplete and additional data completely recorded

Features

You can use this function to manually change one of the following processing statuses of external HR master data records:

- All data transferred completely; additional data still to be recorded
- Transferred data still incomplete and additional data completely recorded
- Personnel action is completely processed

  If you have inadvertently assigned this status, it can be reset to Employee HR master record created.

For more information, see:

Graphic display of status transfers [Page 20] resulting from a hiring action.
Changing the Processing Status of External HR Master Data

Use
This procedure enables you to change the status of external HR master data that was transferred during a hiring action to the SAP HR System.

Prerequisites
The following entries must exist in the worklist for the interface table.
- *All data transferred completely; additional data still to be recorded*
- *Transferred data still incomplete and additional data completely recorded*
- *Employee HR master record created*

Procedure
To change the processing status when transferring external HR master data, proceed as follows:
1. Expand the tree structure in the display screen for the worklist.
2. Choose a personnel number or an employee name with one of the following statuses:
   - *All data transferred completely; additional data still to be recorded*
   - *Transferred data still incomplete and additional data completely recorded*
   - *Employee HR master record created*
3. Choose **Employee → Change processing status**.
   - If you process an entry with the *Employee HR master record was created* status, you can assign one of the following statuses:
     - *All data transferred completely; additional data still to be recorded*
     - *Transferred data still incomplete and additional data completely recorded*
     - *Personnel action is completely processed*
   - If you process an entry with one of the following statuses:
     - *All data transferred completely and additional data still to be recorded*
     - *Transferred data still incomplete and additional data is completely recorded*, you can assign the following status:
     - *Personnel action is completely processed*
   - If you process an entry with the *Personnel action is completely processed* status, you can assign the following status if you still want to correct the record:
     - *Employee HR master record created.*
The system only offers options for manual changes in status when hiring an employee. The system automatically assigns the applicable processing status for all other types of personnel actions.

**Result**

You have now manually changed the processing status in this personnel action for the selected employees. The overview tree now displays the new status.

For more information, see:

*Transferring External HR Data Manually [Page 11]*
Displaying Status Transfers of a Hiring Action

- **New employee data for manual processing**
  - manually
  - automatically
  - Manually/automatically

- **Errors occurred during automatic processing**

- **Transferred data could not be accepted**

- **Employee master data record created**
  - transfer
  - automatically

- **Transferred data accepted; additional data complete**

- **Transferred data incomplete; additional data incomplete**
  - Administrator confirms complete transfer (without additional data)
  - Administrator confirms complete transfer (with additional data)

- **Personnel action completely processed**
  - Administrator confirms complete additional data
Recording Additional HR Master Data

Use

You can enhance this function to include infotypes in the HR master data transferred from a SAP CAMPBELL system that are required to complete the personnel action.

For personnel numbers with an Employee HR master record created status, the interface allows you to carry out the Enter additional data function, before completely transferring the master data.

Integration

The personnel administrator (and the enterprise) determines the infotypes [Ext.] that are required for a personnel action to be completely processed. The system checks whether the personnel administrator has created at least one employee HR master record containing data for the personnel action, as well as the organizational assignment of the employee.

Prerequisites

- External HR master data was transferred from the interface to the infotypes, and an employee HR master record including personnel numbers was created.
- The applicable Personnel Action for recording additional infotypes relevant for hiring was created to modify processing in the Determine Personnel Action Types Customizing step under the Personnel Action Types section in the IMG (Implementation Guide) for Personnel Management.

Features

This function allows you to go directly to the initial screen for Personnel Actions [Ext.] in the SAP HR System. Here you can call up the personnel action required to record additional infotype data.

Activities

1. In the screen for transferring HR master data from external systems, choose an entry with one of the following statuses:
   - All data transferred completely; additional data still to be recorded
   - Employee HR master record created
2. Choose the Record additional data function.
   The Personnel Actions screen appears.
3. Add or maintain the data required as determined by the Customizing settings you made previously.
Recording Additional HR Master Data

- You can go directly to the maintenance screens for the individual infotypes in SAP Personnel Management by choosing the Maintain HR master data function.

- It is recommended that you transfer the data records before recording any additional data you require. You must use this sequence for a hiring action.
Deleting Data from the HR Master Data Interface

Use

The Reorganize function enables you to delete the following data from the worklist in the interface:

- Employee data that has been completely processed
  This data is displayed in the interface’s tree display with a green icon.
- Employee data that was rejected by the system because an error could not be corrected, and could not be processed
  This data is displayed in the interface’s tree display with a stop sign.

Prerequisites

External data was transferred to the HR master data interface, and was either confirmed as completely processed, or was rejected by the system because it could not be processed for some reason.
Deleting Data from the Interface

Use

Data that cannot be processed, as well as data completely processed after closing a personnel action remain in the HR master data interface until you use the Reorganize function.

- Data that cannot be processed (such as when processing errors occur that cannot be corrected) are indicated by a red stop sign in the worklist.
- Processed data is indicated in the worklist by a green icon after the personnel action is closed.

Prerequisites

The work list in the master record interface must contain data records that have been completely processed, or rejected.

Data records that are rejected include:

- An employee with this external ID has already been hired
- Personnel number already assigned
- Transferred data could not be processed

Procedure

To delete data from the external HR master data interface, proceed as follows from the selection screen for external master data:

1. Choose the Reorganize function in the Processing type screen section.
2. Restrict the selection to personnel areas and actions, if necessary.
3. Select one or both of the following options in the Processing status section:
   - If you want to delete all of the data that cannot be processed, select Rejected data records.
   - If you want to delete all processed data, select Action completely processed.
4. Choose Execute. A screen with a list of all HR master data corresponding to your selection criteria appears.

Data records for hiring actions can only be selected after a confirmation IDoc has been sent to the external system.

5. Select the entries you want to delete from the interface.
6. Choose Reorganize data.
7. Accept the system confirmation prompt.
Result

You have now deleted data from the interface that is either no longer required or could not be processed.

Data records that could not be processed and those with errors deleted during the reorganization of the interface must either be imported again, or the relevant data must be re-entered manually in the SAP HR System.