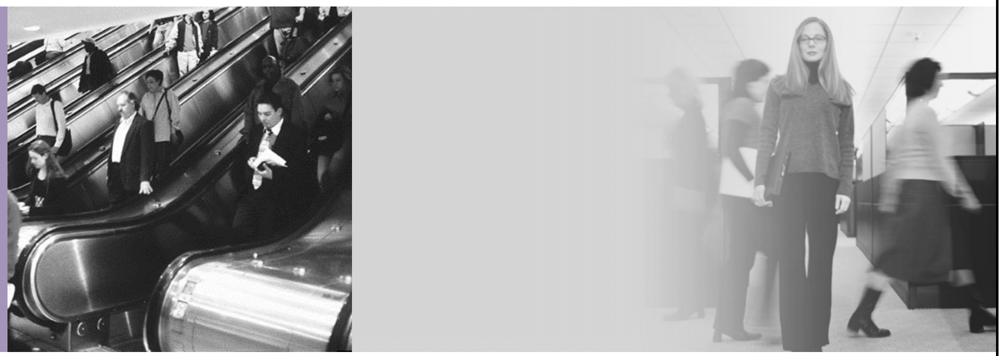

HR100

Basics of Personnel Administration

THE BEST-RUN BUSINESSES RUN SAP

- SAP R/3 Enterprise
- 2003/Q2
- 50059656

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Course Prerequisites

Prerequisite:

- **SAPHR** ***(Overview of the mySAP Human Resources solution)***

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Target Group

Target group:

- Project team members
- Employees in an HR department

Duration:

- 2 days

User notes

- These training materials are not a teach-yourself program. They complement the explanations provided by your course instructor. Space is provided on each page for you to note down additional information.
- There may not be sufficient time during the course to complete all the exercises. The exercises provide additional examples that are covered during the course. You can also work through these examples in your own time to increase your understanding of the topics.

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Course Overview

Contents:

- Course Goals
- Course Objectives
- Course Content
- Course Overview Diagram
- Main Business Scenario

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Course Goals

This course will prepare you to:

- Comprehend and carry out the basic process in Personnel Administration and Time Management in the system
- Explain the various options provided by HR reporting

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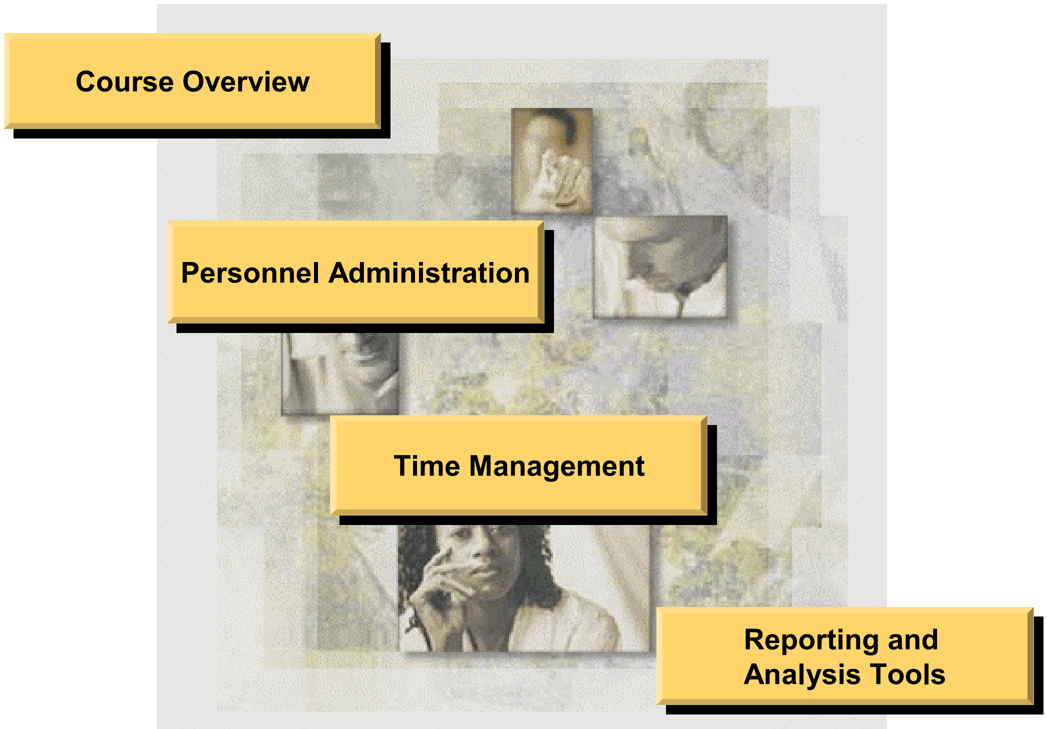
Course Objectives

At the conclusion of this course, you will be able to:

- Explain major functional areas of SAP R/3 Human Resources such Personnel Administration and Time Management
- Run reports

Course Content

Course Overview Diagram



Main Business Scenario

- Your company is an international company that manufactures and distributes bicycles and bicycle accessories.
- Your company has implemented R/3 Human Resources and uses all of its components.
- You require an overview of these components.
- You will conduct Human Resources functions.

Personnel Administration

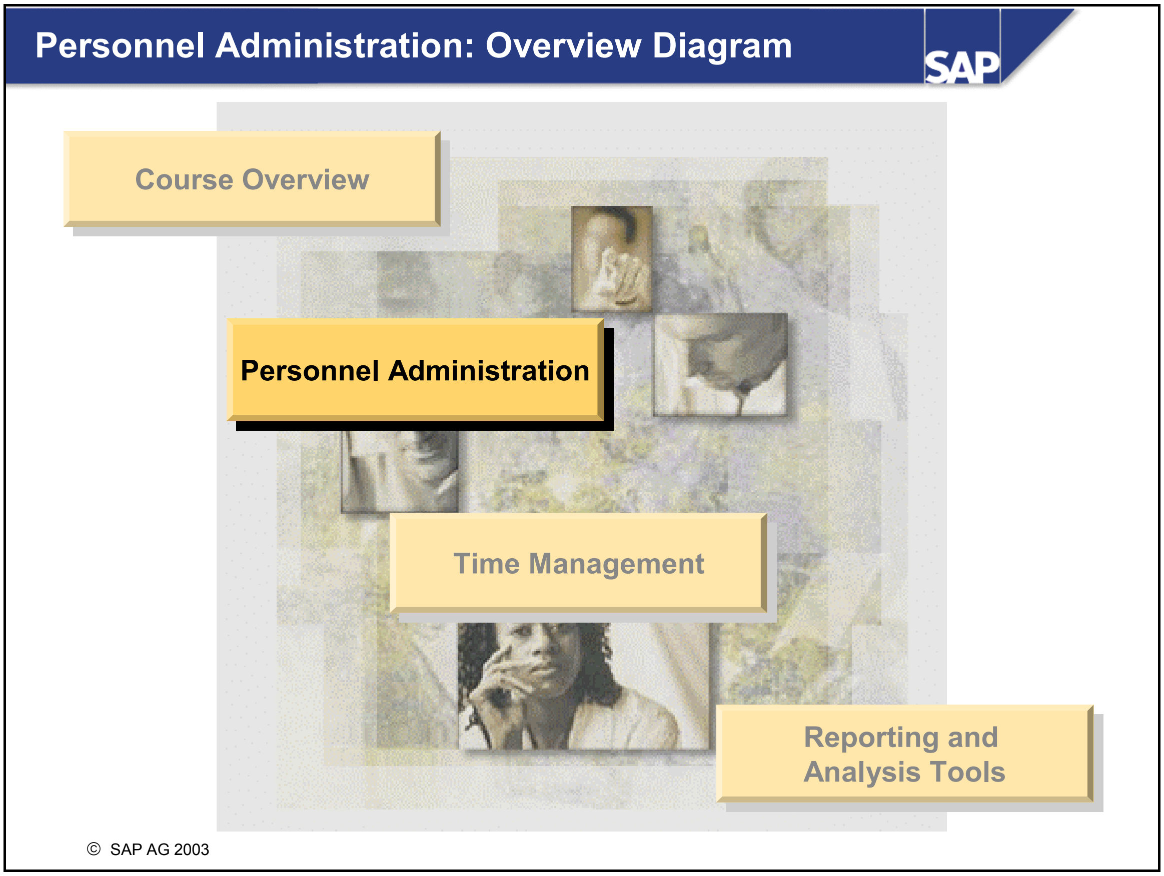
Contents:

- **Individual Infotype Maintenance**
- **Fast Entry**
- **Personnel Actions**

Personnel Administration: Unit Objectives

At the conclusion of this unit, you will be able to:

- **Maintain employee data**
- **Run personnel actions**



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Personnel Administration: Business Scenario

Part A: Individual Infotype Maintenance

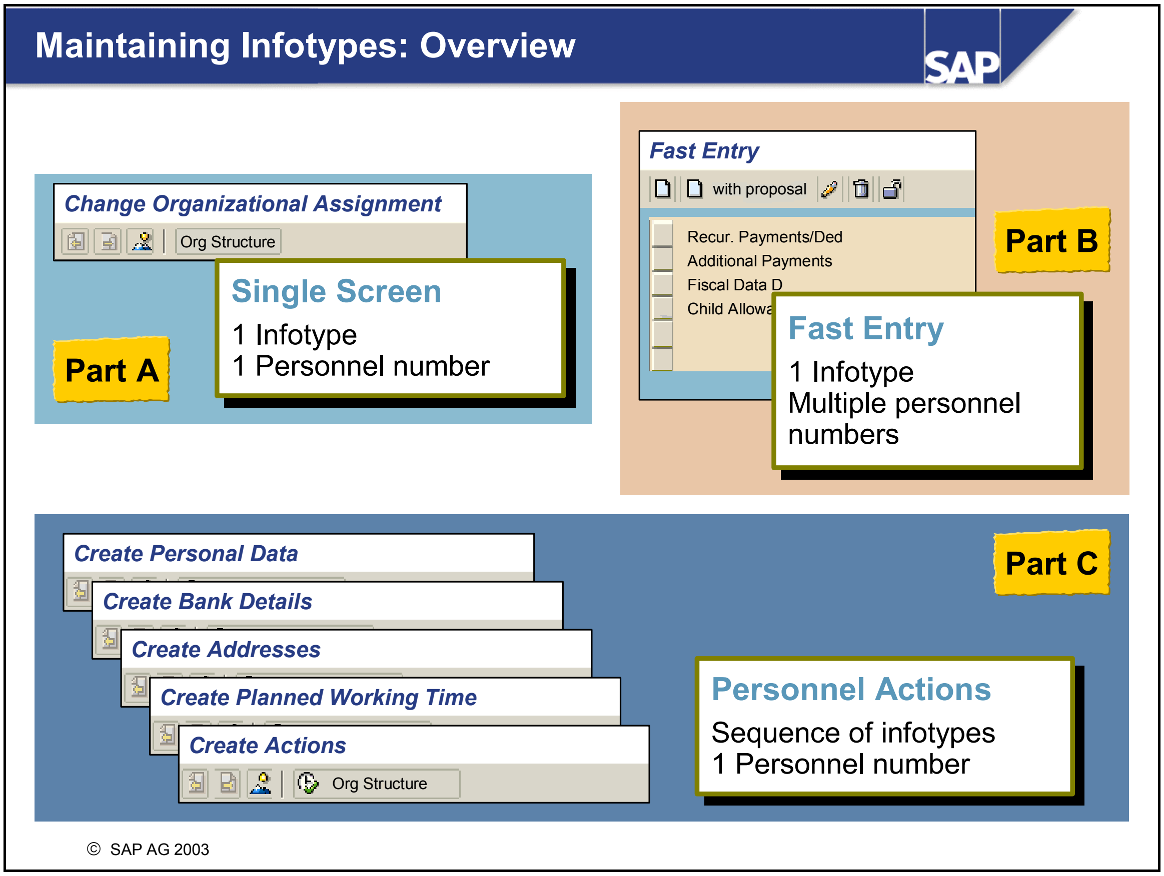
- **An employee's bank details change.**

Part B: Fast Entry

- **A bonus is paid out to an entire department.**

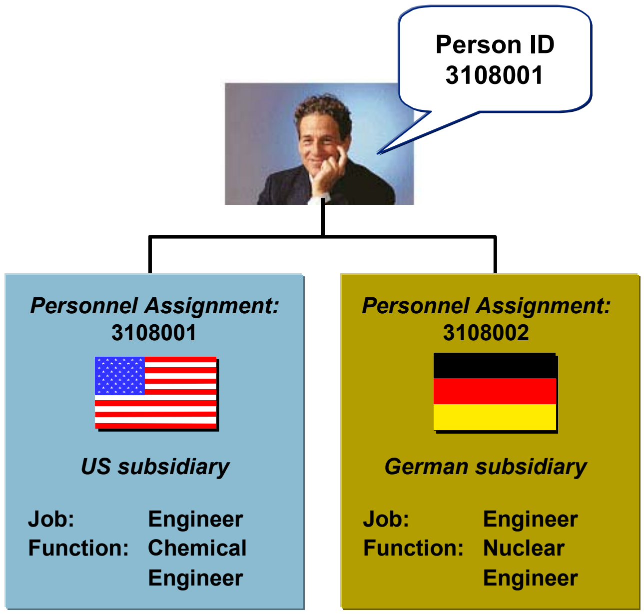
Part C: Actions

- **A new employee is hired.**



- Employee data must be kept current. Data can be displayed, corrected, and supplemented.
- The R/3 Human Resources system stores an employee's data in infotype records. Each infotype record has a validity. This is generally a validity interval or a key date.
- There are three different ways of processing infotype records: single screen maintenance, personnel actions, or fast entry.
- **Single screen maintenance (individual infotype maintenance):**
  You can call individual infotypes to maintain data for a particular subject or situation. You maintain one infotype at a time for a personnel number.
- **Personnel actions:**
  If the subject or situation is more complex and you need to maintain more than one infotype, you can use personnel actions. When you perform a personnel action, the system displays all of the relevant infotypes for you to maintain, one after the other.
- **Fast entry:**
  Fast entry enables you to maintain an infotype for more than one personnel number simultaneously.

Digression: Concurrent Employment Model



Person

Name, date of birth, marital status (person-related data)

Personnel Assignment

Shows the details of the global assignment: remuneration, work schedule, country of global assignment

Function

Describes the tasks an employee must perform during the global assignment

- Management of Global Employees is available as of SAP R/3 Enterprise - HR Extension 1.1.
- A global employee can complete one or multiple global assignments for his or her global company.
- The Concurrent Employment Model in mySAP HR describes the relationship between employee and employer. The most important concepts in the Management of Global Employees are as follows:
  - Each employee can have multiple personnel assignments, each of which in **a different country**.
  - Each personnel assignment is linked to the person.
- The person ID enables you to track the global employee in the whole enterprise for the duration of his or her assignment.
- The person ID is stored in the *Person ID* infotype (0709).
- A personnel assignment describes the tasks the person has to perform, the country of the global assignment, and other infotypes. In mySAP HR, a personnel number is therefore assigned to each personnel assignment.

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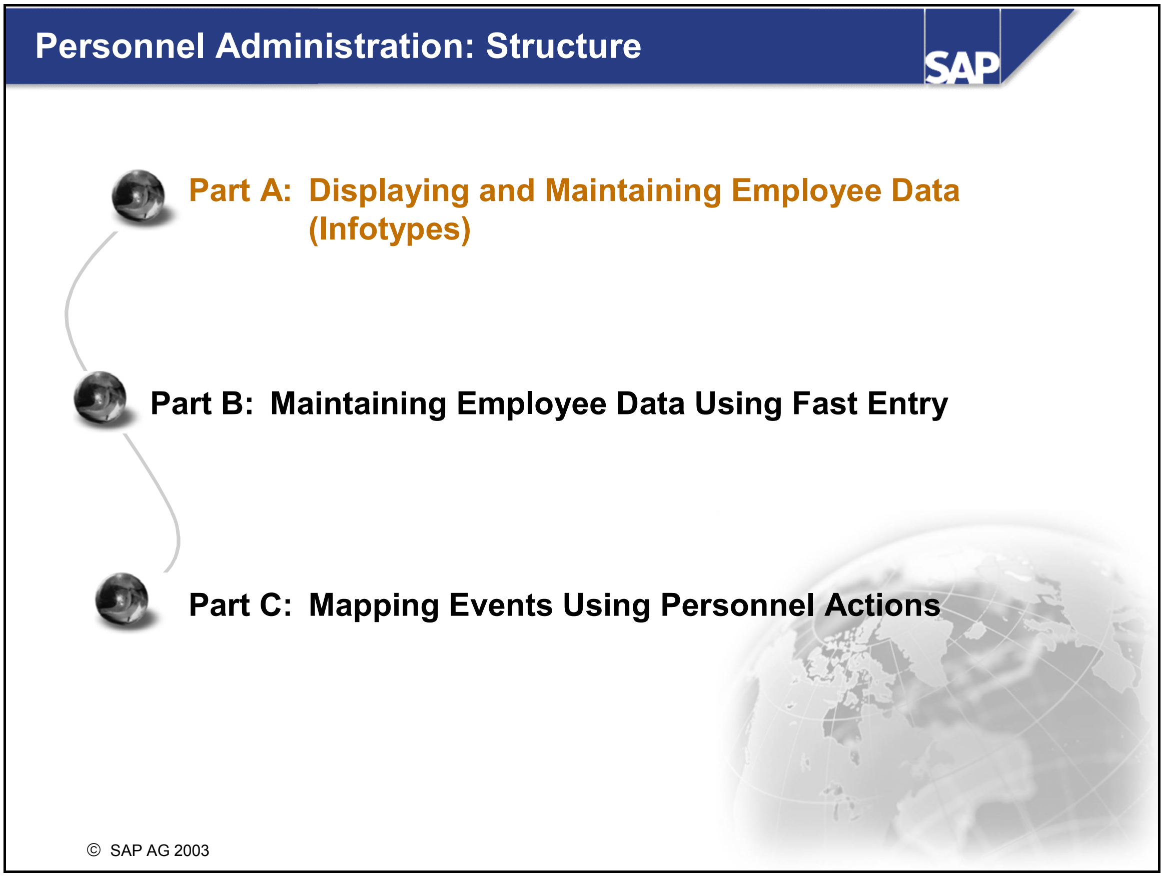
Personnel Administration: Structure
Part A: Displaying and Maintaining Employee Data (Infotypes)
Part B: Maintaining Employee Data Using Fast Entry
Part C: Mapping Events Using Personnel Actions
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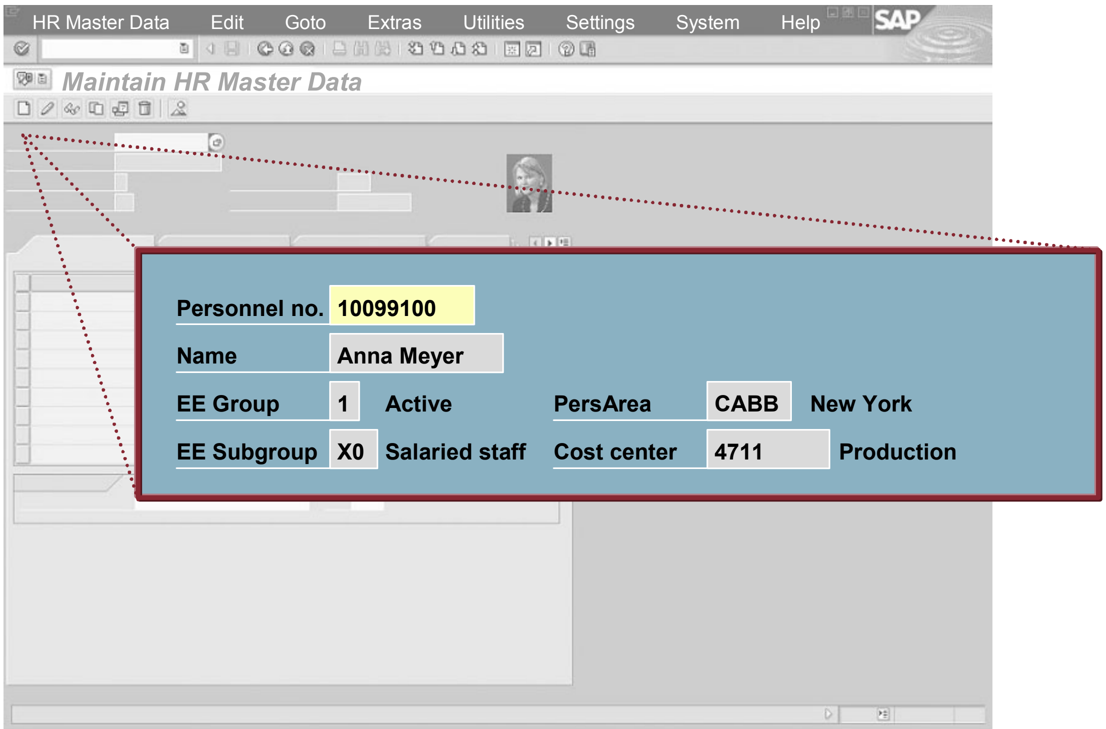
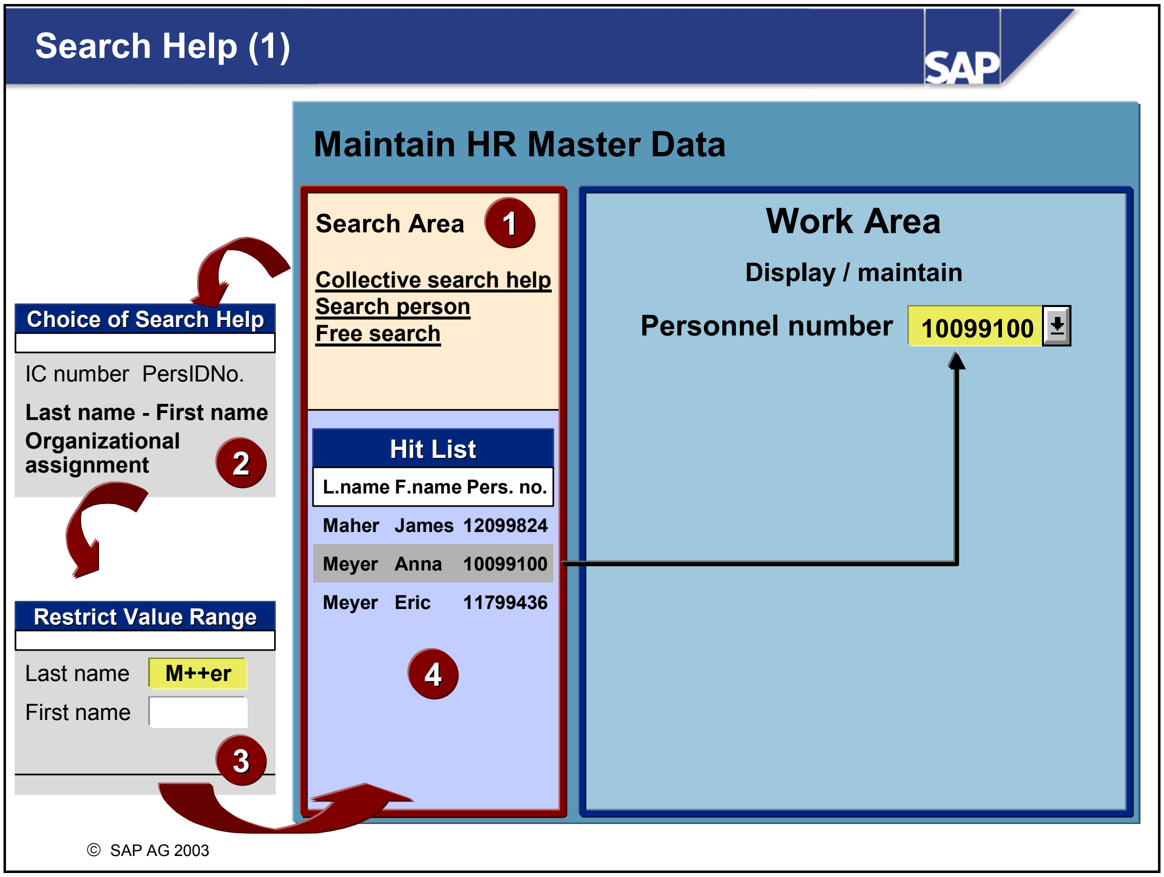
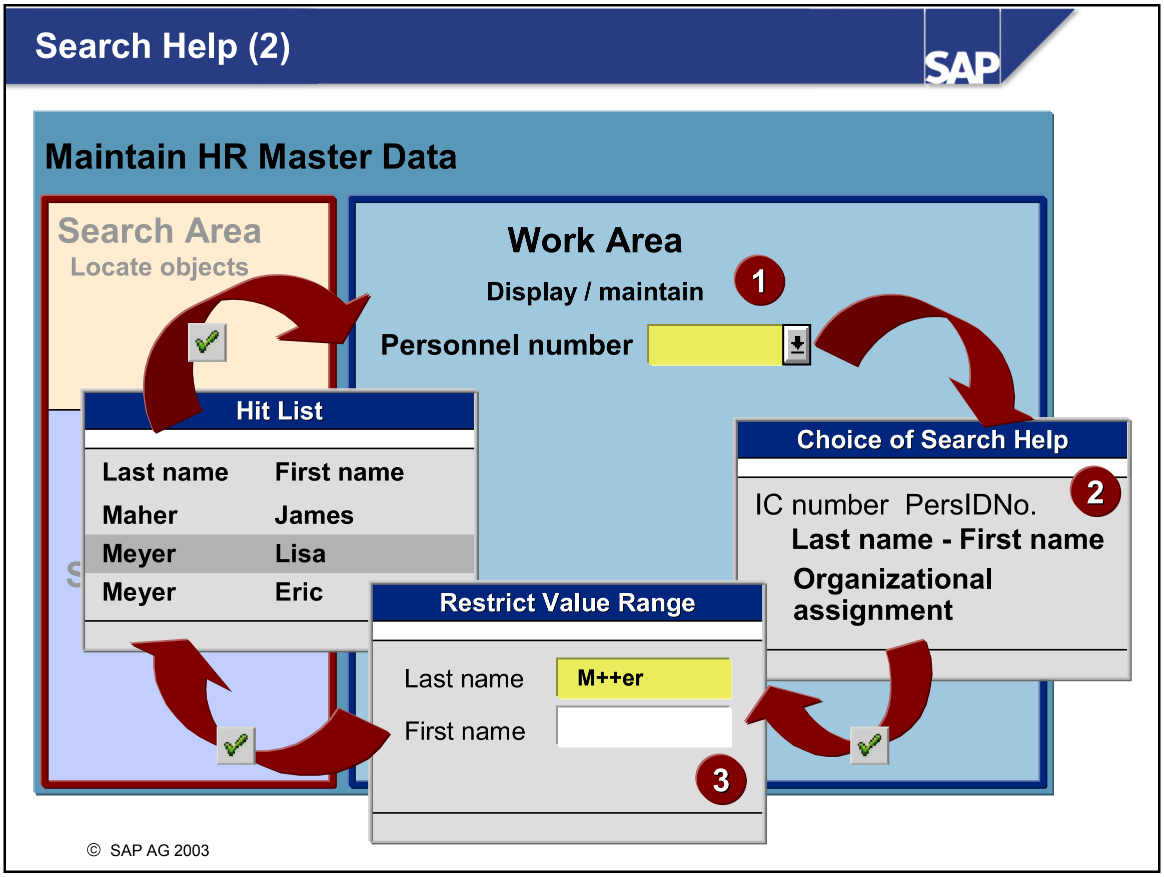
Initial Entry Screen for Infotype Maintenance



- In the R/3 HR system, infotypes that are most frequently used are grouped together by subject matter and assigned to static menus. One infotype can be included in more than one menu. Infotypes that are rarely used, on the other hand, might not be included in any menus at all.
- To access a particular menu, click on the tab page.
- The green ticks next to the menu list of infotypes indicate that these records already exist for the selected personnel number.

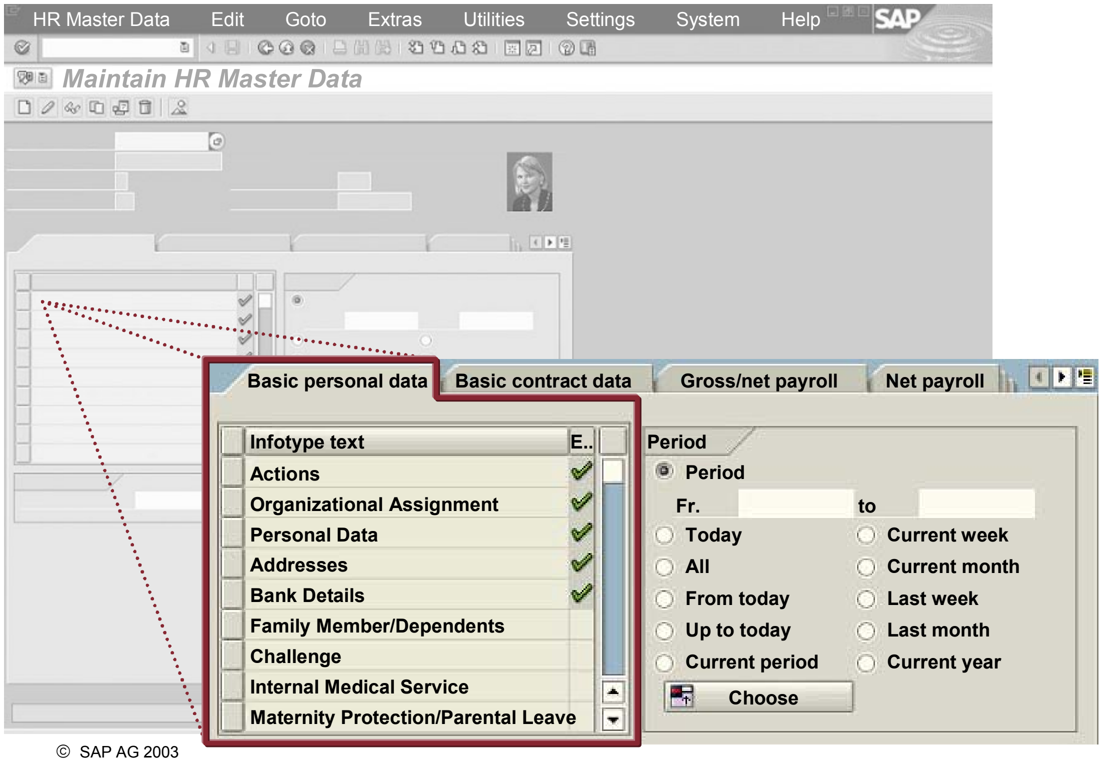


- To maintain employee data for individual employees, you must enter the personnel number. If you do not know this number, you can use the search help to find it.
- The Search Help function in the work area enables you to select personnel numbers according to certain criteria such as last name, first name, birth date, organizational assignment, and so on. To search for a personnel number using the search help, proceed as follows:
  1. Choose one of the search options from the search area.
  2. You can now further define the type of search you want to use.
  3. On the next screen, you can restrict the value range of the search.
  4. The system displays a hit list of all the personnel numbers that match the selection criteria you entered in the selection area. Select the desired data record from the hit list.



- To maintain employee data for individual employees, you must enter the personnel number. If you do not know this number, you can use the search help to find it.
- The search help function in the work area enables you to select personnel numbers according to certain criteria such as last name, first name, birth date, organizational assignment, and so on. To search for a personnel number using the search help, proceed as follows:
  1. Position the cursor on the Personnel number input field and double-click the arrow symbol or choose F4.
  2. You can now select the type of search you want to use. You can switch to another type of search help at any point.
  3. On the next screen, you can restrict the value range of the search.
  4. The system displays a list of all the personnel numbers that match your selection criteria. Select the desired data record from the hit list.

Initial Entry Screen for Infotype Maintenance



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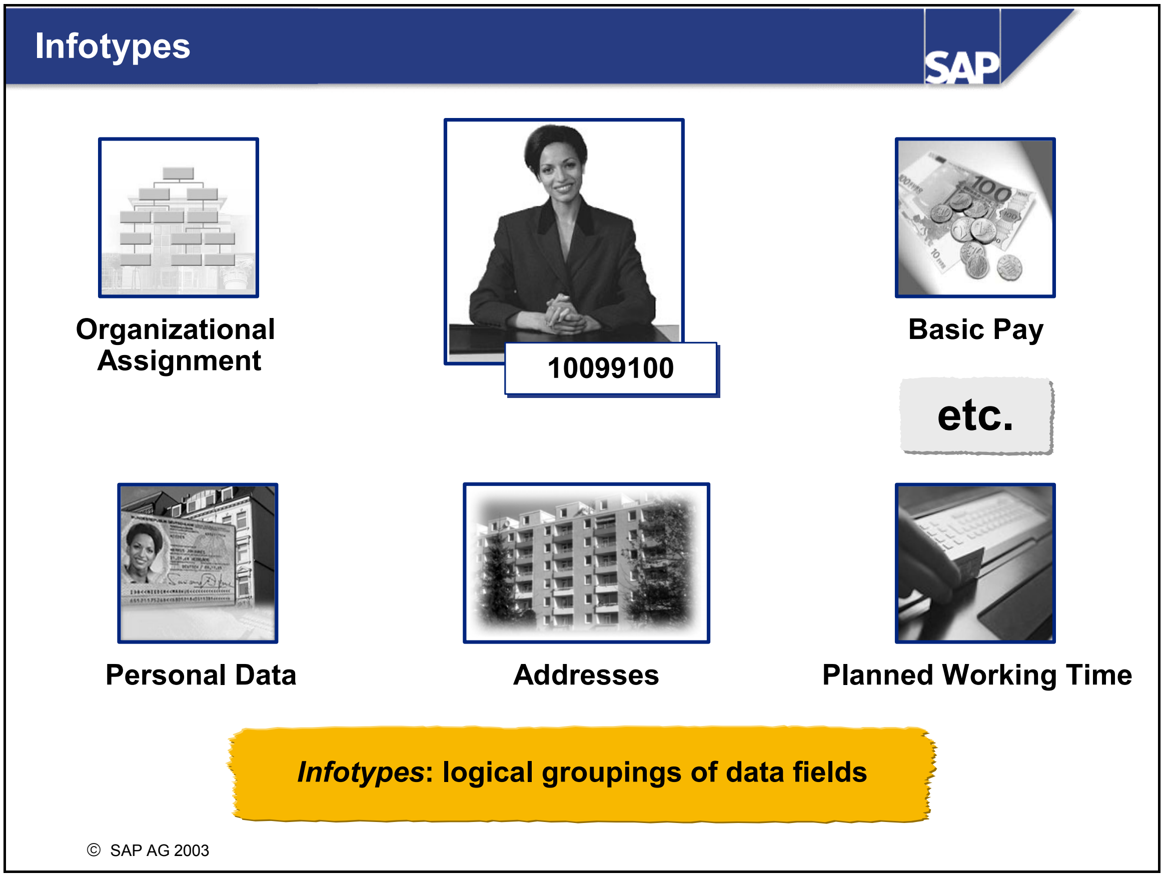
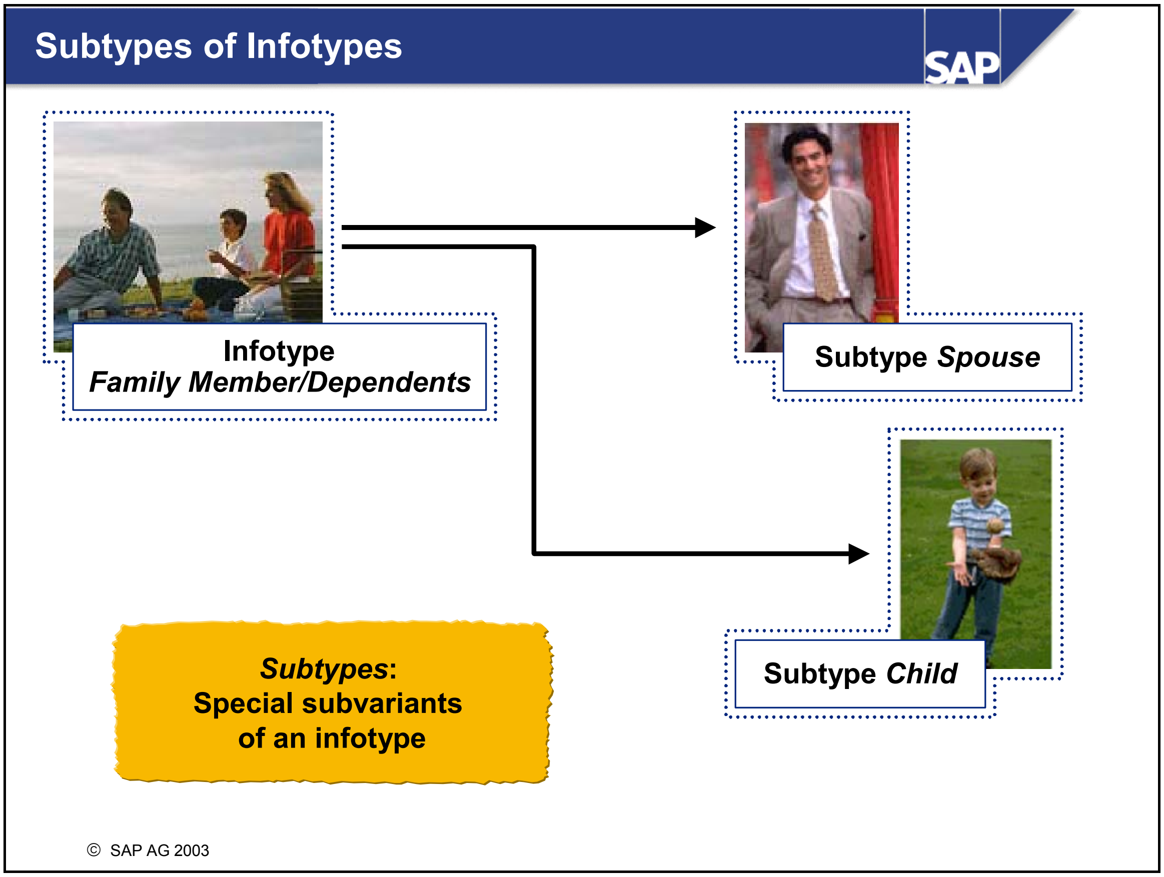
- To access a particular menu, click on the tab page.
- The green ticks next to the menu list of infotypes indicate that these records already exist for the selected personnel number.

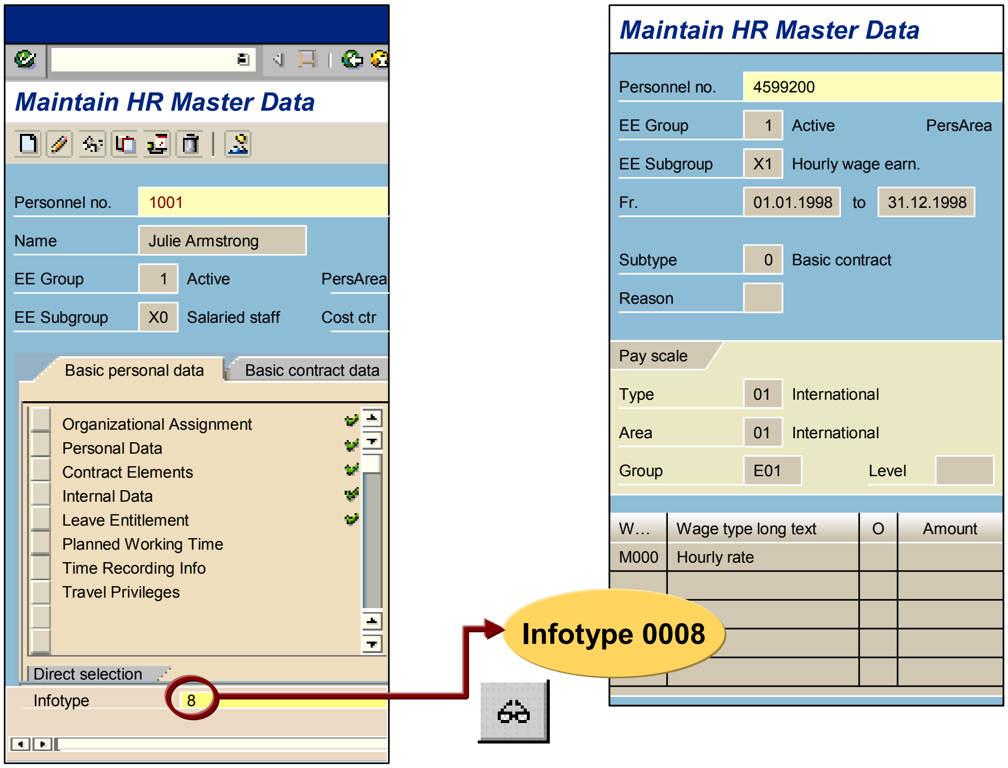


- Individual information, such as last name, first name and date of birth, is defined in data fields.
- Data fields are grouped into data groups or information units according to their content. In Human Resources, these information units are called information types or infotypes for short.
- HR data is therefore stored in groups that logically belong together according to content. For example, place of residence, street, and house number make up an employee's address and are consequently stored (together with additional data) in the the *Addresses* infotype.
- Infotypes have names and 4-digit keys. The *Addresses* infotype, for example, has the key 0006.



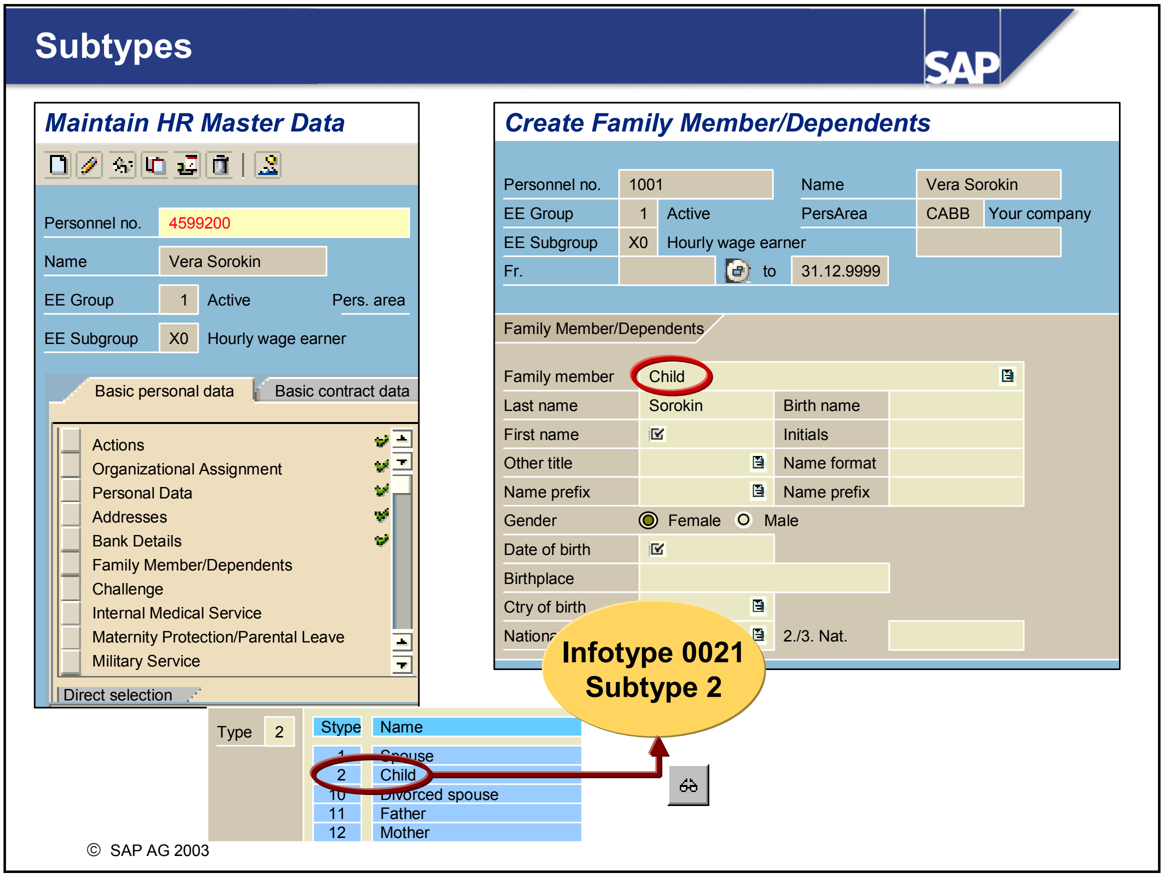
- Infosubtypes, or subtypes for short, subdivide an infotype's data records. You may want to subdivide such information to make it easier to manage or because you want to assign different control features (such as time constraints) to the various subtypes of an infotype. You can also create separate histories for each subtype.
- Example: in the *Family Member/Dependents* (0021) infotype, you enter different family members in the subtypes:
  - Spouse (subtype 1)
  - Child (subtype 2)

Selection Using Infotype Number



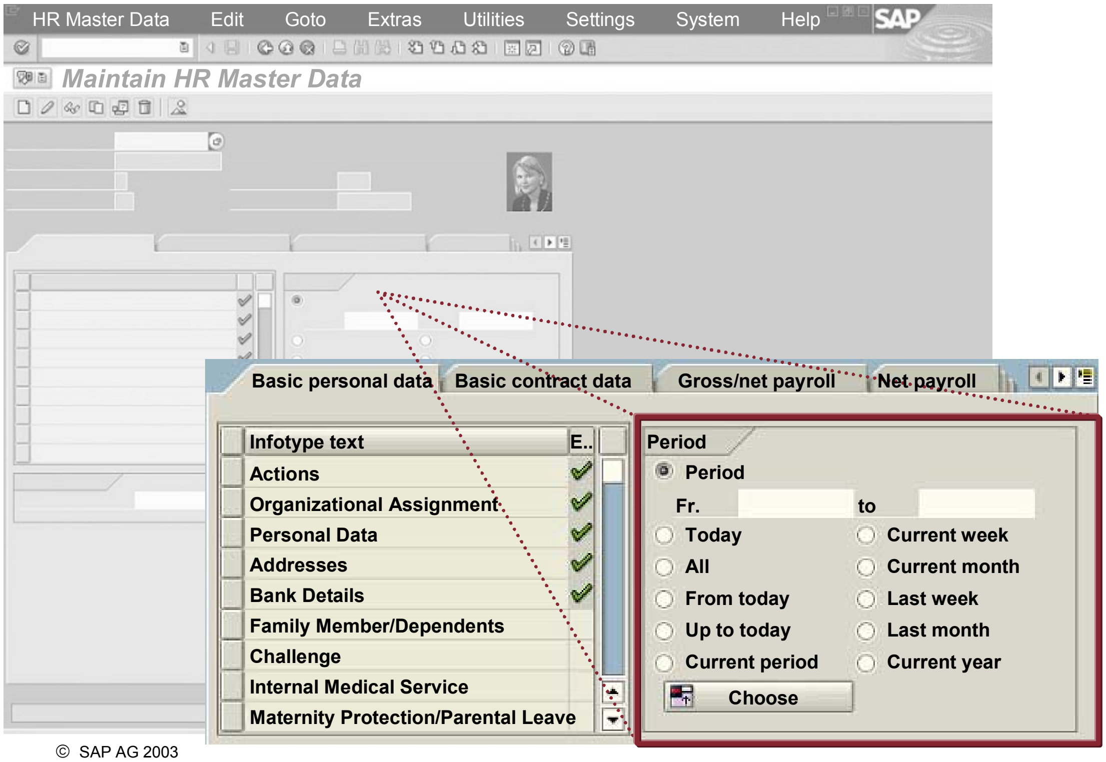
■ Each Infotype has a numerical key in addition to a name key.

■ If you want to access infotypes by the numerical key, enter the number for the infotype in the Infotype field. Choose Enter. The system displays the name of the infotype you selected in the Infotype field.



- Subtypes are subtle subdivisions of an infotype.
- In the Address type subtype of the *Addresses* (0006) infotype, you can store different types of addresses:
  - Permanent residence (subtype 1)
  - Temporary residence (subtype 2)
  - Home address (subtype 3)
- The entry screens for the various subtypes may be different.
- You can assign access authorizations for each subtype.

Initial Entry Screen for Infotype Maintenance



- Data records are always stored in the system with a start date and an end date. This enables you to save data for exact periods.
- When you select infotypes, you can specify a selection period in the displayed screen area.

Time Constraints in HR

Time Constraint 1:

This is *mandatory* information that must be *uniquely* available at all times.

Time Constraint 2:

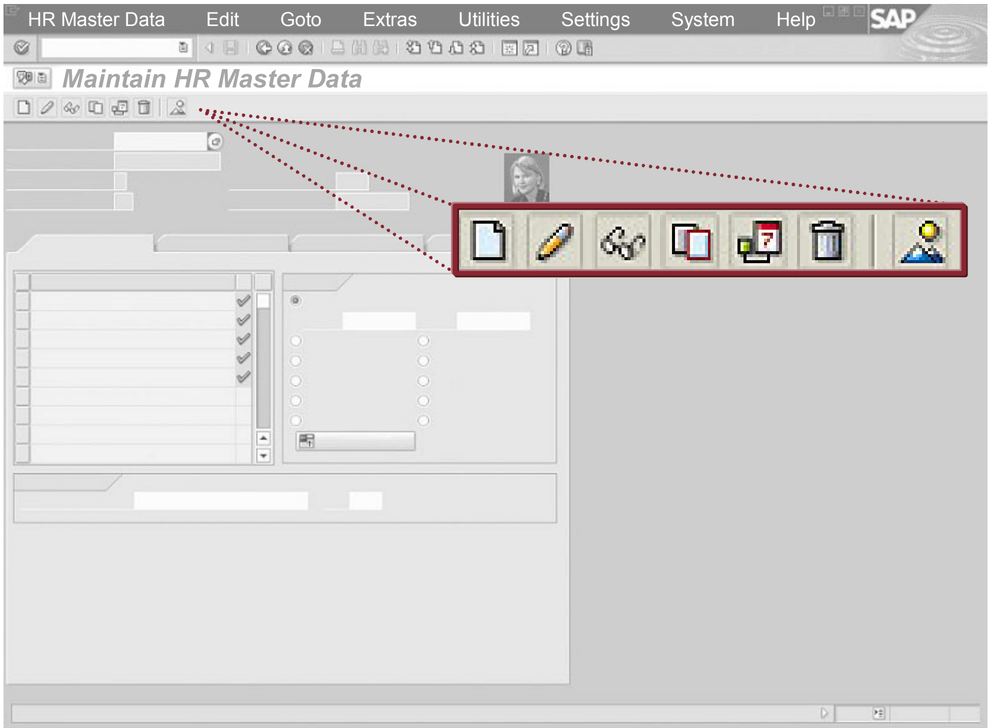
This is *optional* information that, if available, must be *unique*.

Time Constraint 3:

This is *optional* information that, if available, can exist *more than once*.

- When you update an infotype, the old data is not lost. Instead, it remains in the system so that you can perform historical evaluations. Each infotype record is stored with a specific validity period. This means that the system can contain more than one record of the same infotype at the same time, even if their validity periods coincide.
- If you enter and save new information in an infotype, the system checks whether a record already exists for this infotype. If this is the case, the system reacts based on rules or time constraints set up for that particular infotype or subtype.

Initial Entry Screen for Infotype Maintenance



- There are various processing options you can use to maintain master data.
- The processing options for infotype records include:
  - Create
  - Edit
  - Copy
  - Delimit
  - Delete

Maintaining Infotypes

New records

Create

New infotype record
Blank entry screen
Fill required fields
History

Copy

New infotype record
Screen from previous record
Modify fields
Overwrite start date
History

Changing existing records

Change (= correct)

Correct errors
Enter missing data in fields
No history

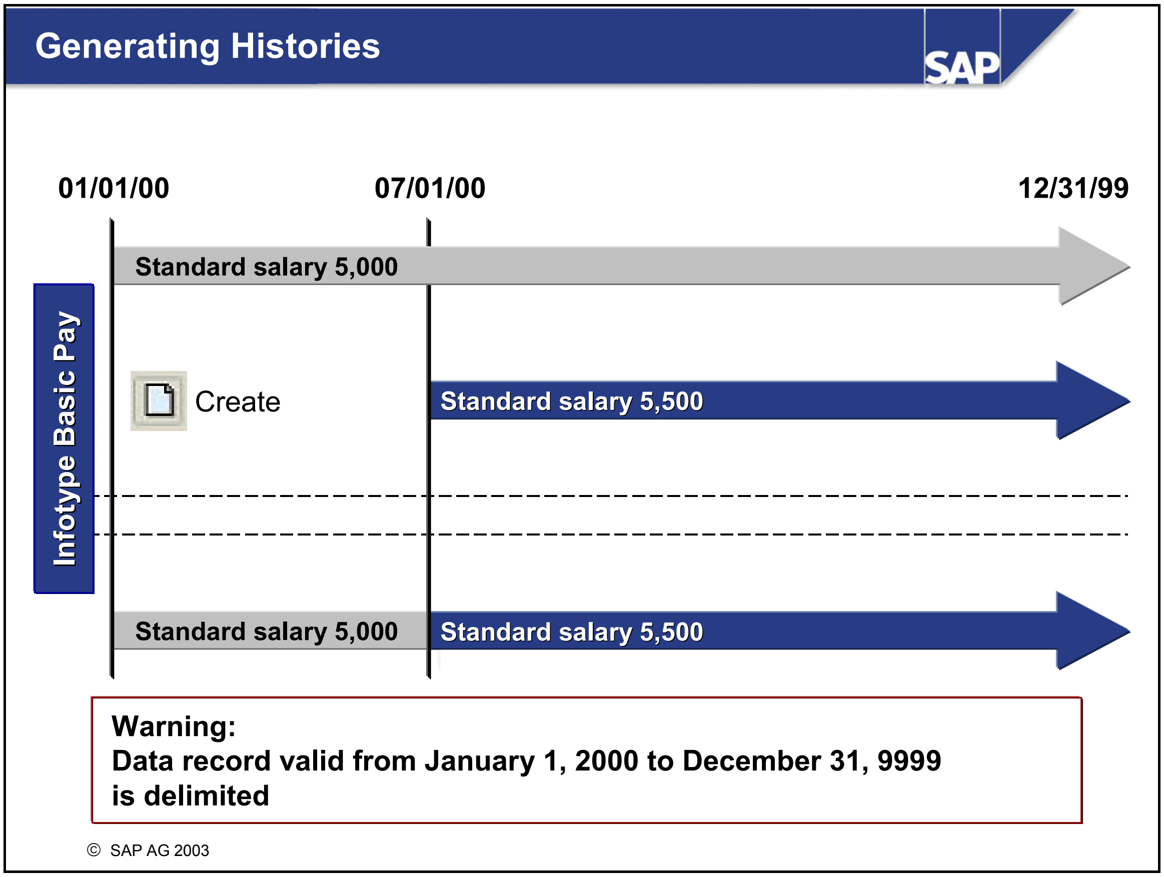
Delimit

Enter end date for current record
History

Delete

Remove infotype from database
No history

- Infotype maintenance means processing data already in the system, and entering and saving new data. You can change existing records and add new records for an employee.
- **Change**
  The Change function enables you to correct an existing record without creating a new one. You can use it to overwrite existing infotype records, but not to create new infotype records. Changes to infotype records are not included in the history.
- **Create**
  The Create function enables you to enter new data. You create a new record while the old record, which may be delimited if necessary, remains in the system. The infotype history is created using the appropriate validity periods.
- **Copy**
  The Copy function also enables you to create new infotype records, and it also updates the infotype history. Unlike the Create function, however, you do not enter your data on a blank entry screen. Instead, you use a screen containing the currently valid data. You can then overwrite these values.



- If you create a new record when a previous record already exists, the system reacts in one of the following ways: it delimits, extends, divides, or deletes the record. The system's reaction depends on the time constraint. The time constraint is a characteristic of infotypes and subtypes. In Master Data, we differentiate between three different time constraints (1, 2, and 3).
- Infotypes or subtypes with *time constraint 1* must be unique, meaning that only one valid record can exist for any given period. There can be no gaps between records here. When you add a new record to an infotype with time constraint 1, the system delimits the overlapping infotype record on the key date and adds the new record. This happens with the *Basic Pay* infotype (0008), for example. If you delete a record that must exist at all times, the previous record is automatically extended. There can be no gaps between records here.
- Infotypes or subtypes with *time constraint 2* can have at most one record for a given period. There can be no gaps between records. If records overlap, the system adapts the previous record accordingly by deleting, dividing, or delimiting it. An example of an infotype with time constraint 2 is the *Family Member/Dependents* infotype (0021), subtype Spouse (1).
- Infotypes or subtypes with *time constraint 3* can have gaps between records or overlapping records. If records overlap here, the system does not react at all. Examples of infotypes with this time constraint are *Monitoring of Tasks* (0019) and *Objects on Loan* (0040).

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Personnel Administration: Structure

- **Part A:** Displaying and Maintaining Employee Data (Infotypes)
- **Part B:** Maintaining Employee Data Using Fast Entry
- **Part C:** Mapping Events Using Personnel Actions

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Fast Entry

Options for Using Fast Entry:

Scenario 1:

Individual employees receive bonuses of differing amounts at different times.

Scenario 2:

All employees of an entire personnel subarea receive the same bonus on the same date.

- Fast entry enables you to maintain an infotype for more than one personnel number on a single screen. This makes data processing faster and more efficient.
- You manually create lists of personnel numbers or use a report in accordance with predetermined selection criteria.
- The time you need to enter data is considerably reduced by entering default values. You can overwrite the default values on the list screen for any personnel number.
- The data entered in this way is either processed immediately online, or at a later date as a batch input session.

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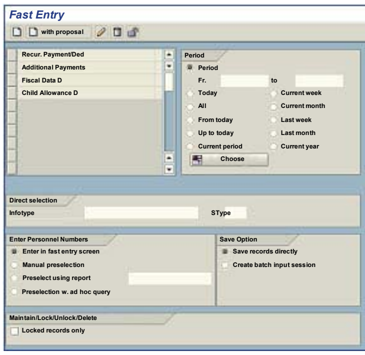
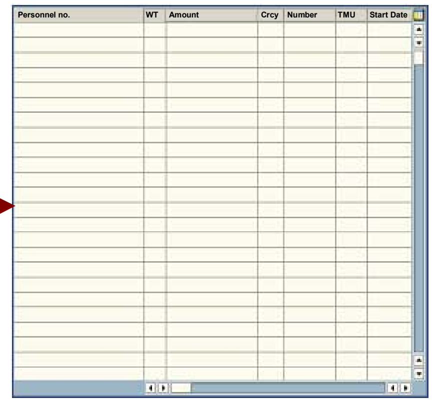
Fast Entry Example 1

Scenario 1:

Individual employees receive bonuses of differing amounts at different times.



On the initial screen, simply select the infotype you want to create and the *Enter in fast entry screen* option.



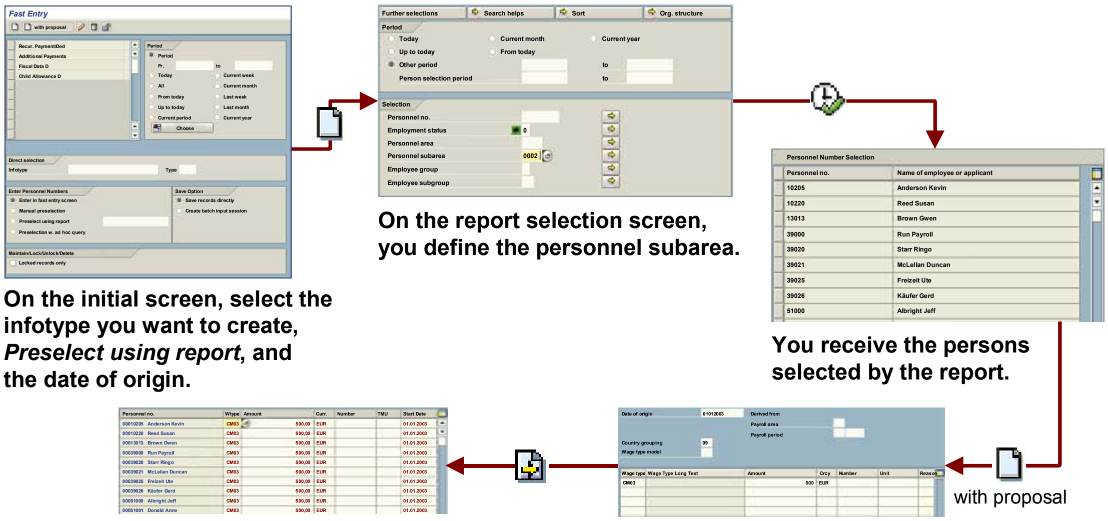
In this list, you can enter the personnel numbers, bonus, and date of origin.

- Fast entry enables you to enter infotype data (for example, additional payments) for several employees.
- The list screen enables you to enter all data freely. This is a very flexible way of entering data.

Fast Entry Example 2

Scenario 2:

All employees of an entire personnel subarea receive the same bonus on the same date.



On the initial screen, select the infotype you want to create, *Preselect using report*, and the date of origin.

On the report selection screen, you define the personnel subarea.

You receive the persons selected by the report.

You define the bonus to be paid.

You receive all the data in a list screen so that you can check it.

- Fast entry enables you to enter infotype data (for example, additional payments) for several employees.
- To enter data using fast entry, you can, for instance, make use of a person selection report.

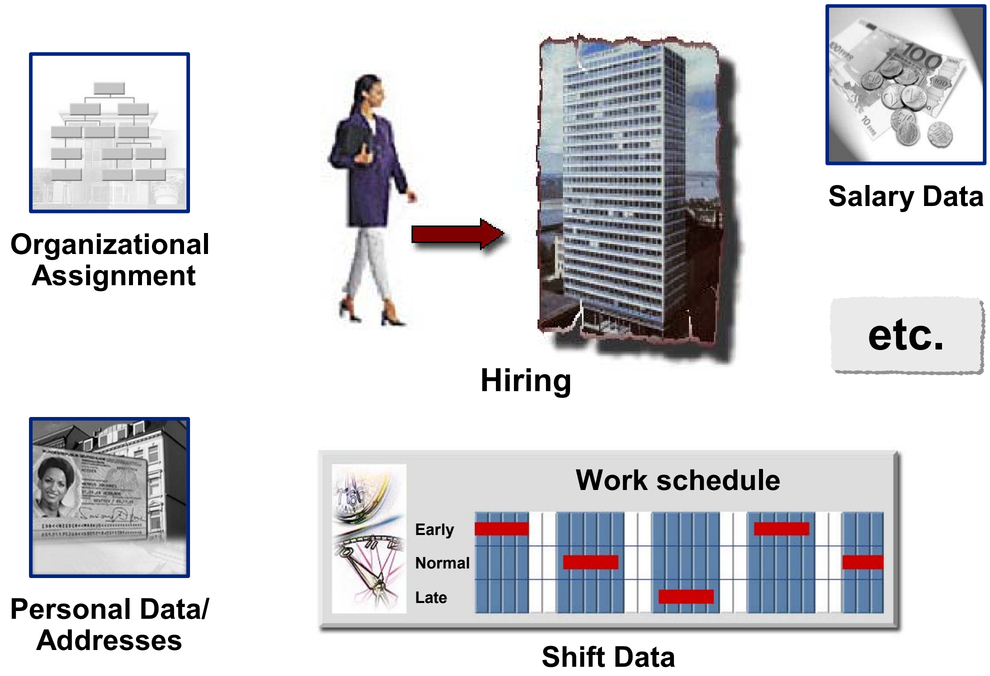
Personnel Administration: Structure

Part A: Displaying and Maintaining Employee Data (Infotypes)

Part B: Maintaining Employee Data Using Fast Entry

Part C: Mapping Events Using Personnel Actions

Hiring an Employee



- The most important objective of master data administration in Human Resources is to enter employee-related data for administrative, time-recording, and payroll purposes.
- You can also hire a new employee without using Recruitment. If you do not choose to use the functions in Recruitment, you can hire the employee using a personnel action in Personnel Administration. In this process, you create the relevant data for the new employee.

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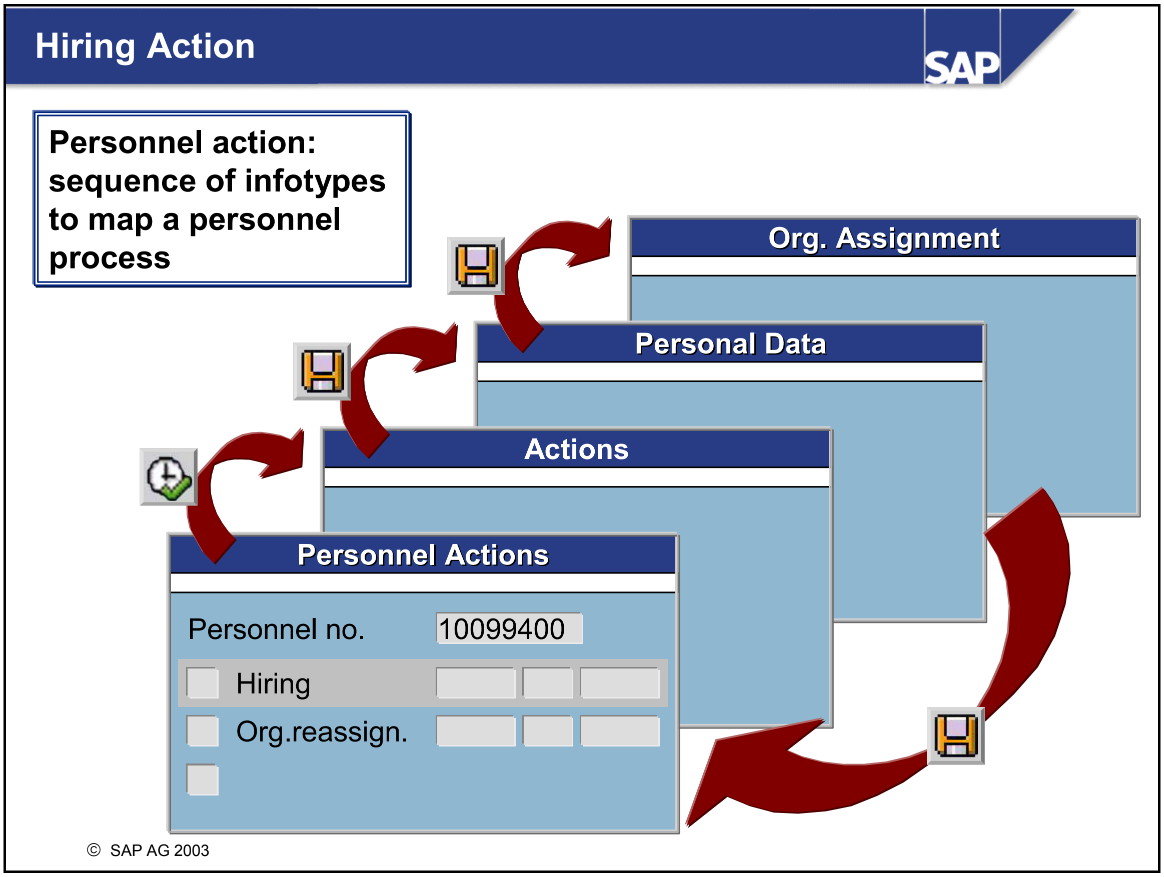

- You must enter a range of employee data into the system when you are hiring an employee. You perform this personnel activity using the Hiring personnel action.
- Once you have entered all the necessary data in an entry screen, you must save your entries. After the system has saved your entries, it displays a new entry screen for processing. If you do not want to record any data here, skip the screen.
- **Note:**
  You can adjust personnel actions in Customizing to meet your requirements.

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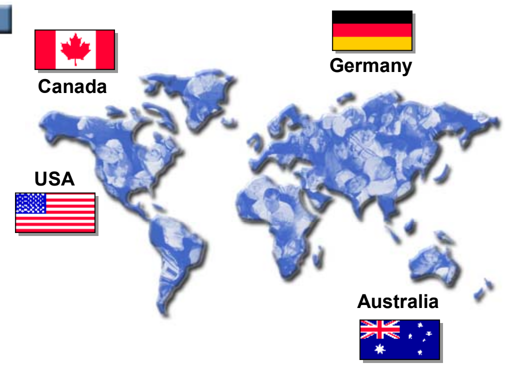
Entry Screens for Hiring

When you hire an employee, you must enter data in the following infotypes :

- **Actions (0000)**
- **Personal Data (0002)**
- **Organizational Assignment (0001)**
- **Addresses (0006)**
- **Planned Working Time (0007)**
- **Basic Pay (0008)**
- **Bank Details (0009)**
- **Absence Quotas (2006)**

+ Country-specific infotypes



- Data is generally recorded for the above-mentioned infotypes during the hiring action. These infotypes, as well as the order in which they appear, can be customized to suit your company's requirements.

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Hiring: Initial Screen

Access via Personnel Actions

Personnel Actions

Pers. no. 10099400

Internal number assignment

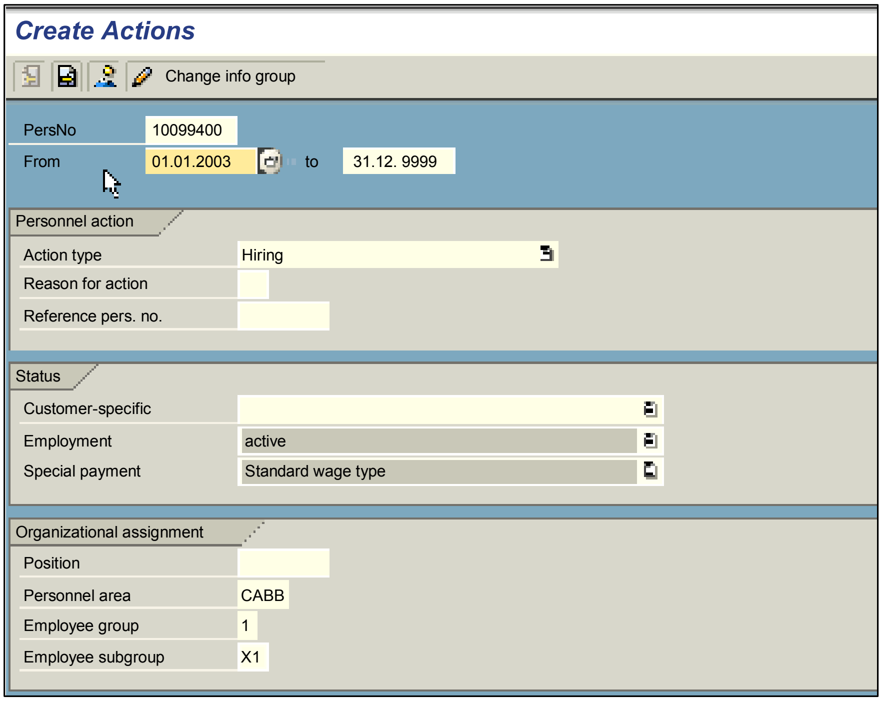
External number assignment

Start

Action type	Pers. Area	EE Group	EE Subgroup
Hiring			
Organizational reassignment			
Transfer (EDP) - active			
Hire applicant			
Transfer (EDP) - retiree			
Change in pay			
Early retirement			
Leaving			
Time recording (mini master)			

- To hire an employee, select the entry screen for personnel actions. Enter the employee's entry date.
- With internal number assignment, the system displays the next free number. With external number assignment, you enter a personnel number that has not yet been used.
- On this screen, you can enter the personnel area, employee group, and employee subgroup of the new employee. You also have the possibility of maintaining these fields in the next screen, the *Actions* (0000) infotype.

Actions



- The *Actions* infotype is the first of the personnel action infotypes. This infotype logs the personnel action. In this infotype, you can also specify a reason for the action. In addition, you can assign a reference personnel number, if the person to be hired has more than one type of employment relationship in the company (several personnel numbers). The status indicators are assigned by the system and cannot be maintained by you.
- You can assign the person to be hired to a position in this infotype. If you have integrated Personnel Planning and Development and have stored information on the position or organizational unit, the system suggests default values for the personnel area (from the organizational unit or position), employee group, and employee subgroup (from the position) fields. Otherwise, you have to enter these values manually.
- **Note:**
  The *Actions* infotype is a prerequisite to the *Organizational Assignment* (0001) infotype. You must save the *Actions* infotype. The values stored in this infotype are copied to the *Organizational Assignment* infotype. You cannot maintain the values there (except for the Position field).

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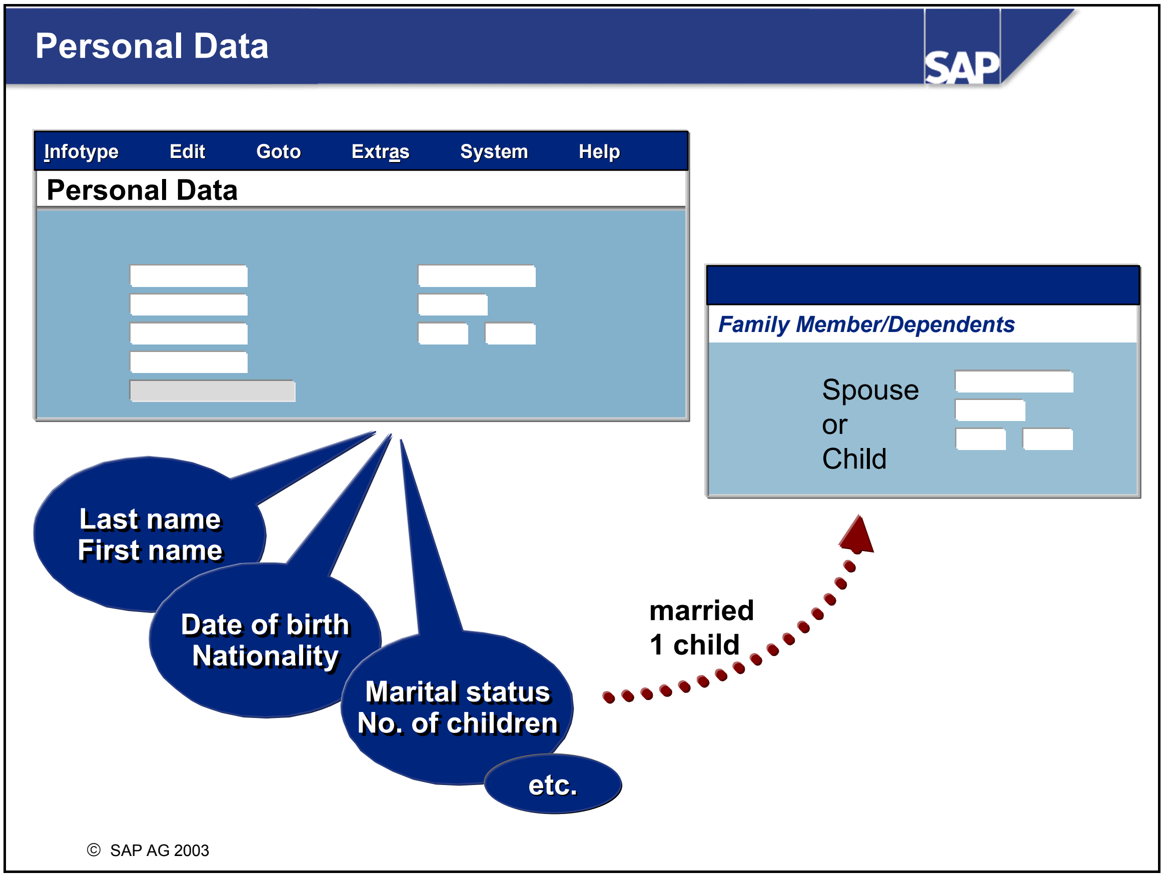

- The *Personal Data* (0002) infotype stores an employee's personal details. This includes, for example, the employee's name, nationality, birth date, and marital status. Depending on the country in which the employee is employed, the infotype uses different screens, which are in part country-specific.
- If the employee's status is given as married in this infotype, the system automatically displays a further infotype, namely the *Family Member/Dependents* infotype (0021), in which you can enter details on the employee's spouse.
- If you enter in the *Personal Data* infotype that the employee has a child, the system automatically displays a further infotype, the *Family Member/Dependents* infotype (0021), in which you can enter details on the employee's child.

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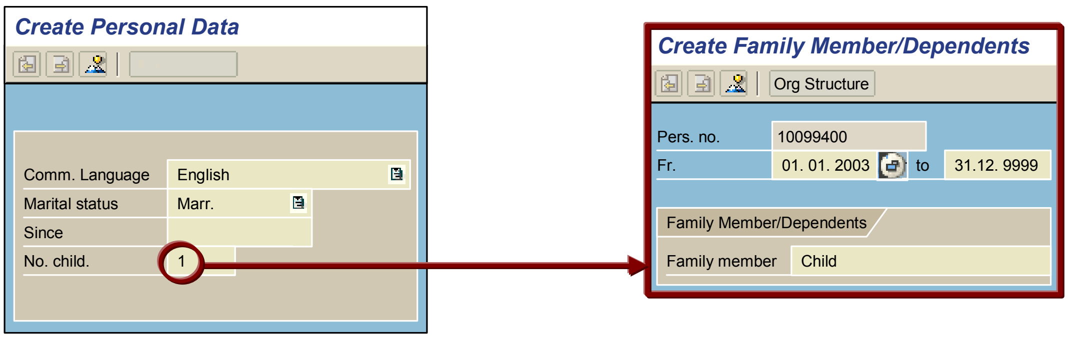
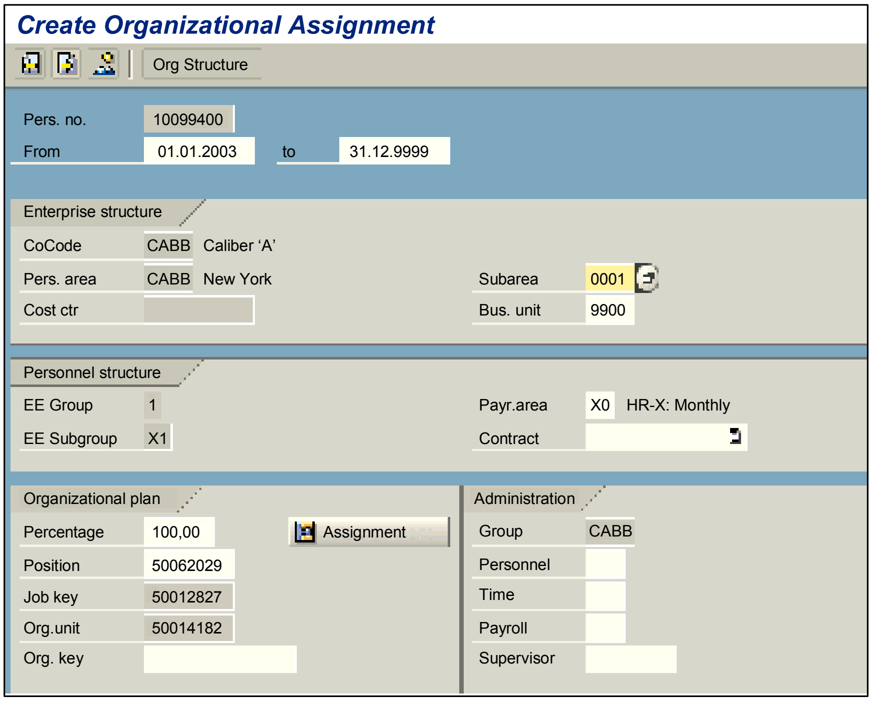
Dynamic Actions

If you make an entry in the *No. child.* field and you save this entry, the system automatically displays the *Family Member/Dependents* infotype and the *Child* subtype for you to maintain.



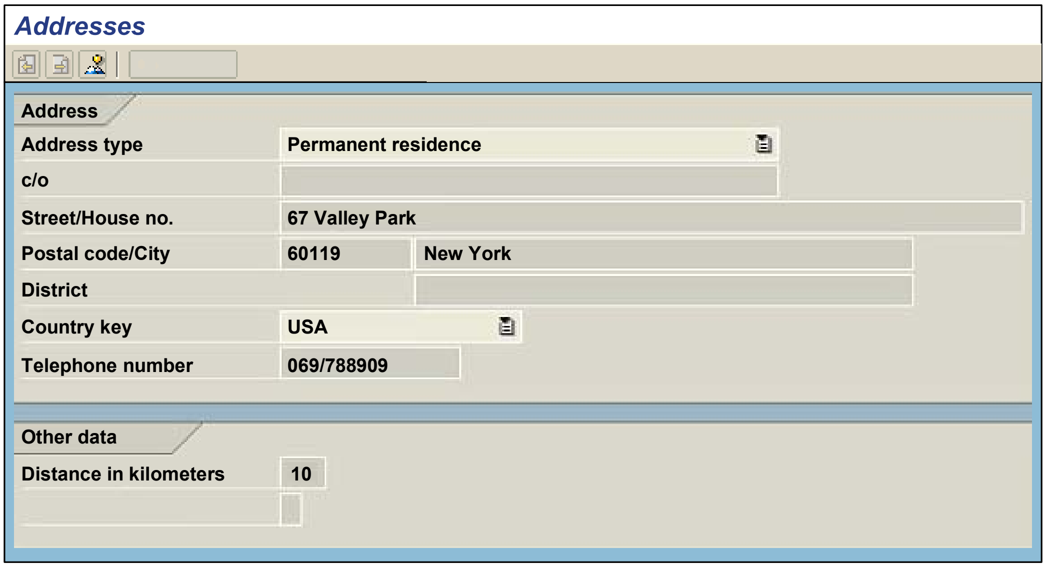
- Dynamic actions are performed automatically by the system, depending on certain conditions. If maintaining one infotype has an effect on another infotype, the system automatically displays the second infotype for processing.
- Dynamic actions can run in the background meaning that the user does not see the run on the screen.
- Examples:
  - You create a new record for the *Personal Data* infotype and fill the No.child. field. After you have saved the record, the system automatically displays the *Family Member/Dependents* (0021) infotype and the Child subtype (2) for processing.
  - When you hire an employee, you enter the probationary period in the *Contract Elements* infotype. After you have saved this information, the system automatically displays a record from the *Monitoring of Tasks* (0019) infotype and the subtype Expiry of probation (1) for processing.

Organizational Assignment



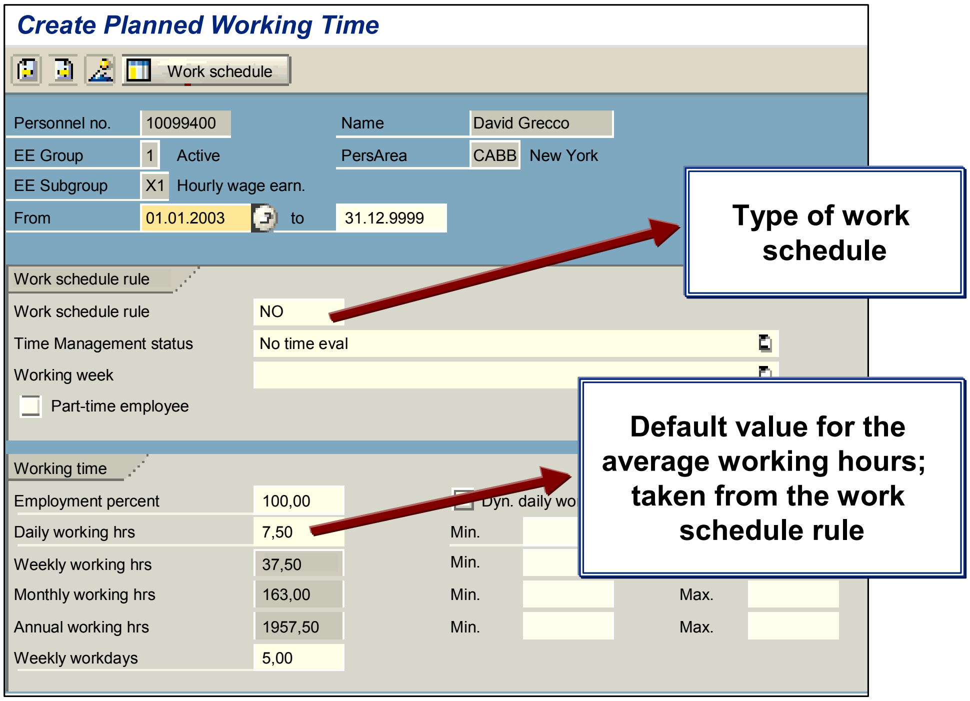
- After you save the *Personal Data* (0002) infotype, the system automatically displays the *Organizational Assignment* (0001) infotype.
- The following fields are already filled by the organizational assignment: company code, personnel area, personnel subarea, business area, employee group, and employee subgroup. You can enter missing data.
- If you did not enter the position in the *Actions* (0000) infotype, you can do so here in the *Organizational Assignment* (0001) infotype.
- The position entered and its existing relationships to a job, organizational unit, and cost center are imported. You cannot overwrite the job, organizational unit, and cost center fields.

Addresses



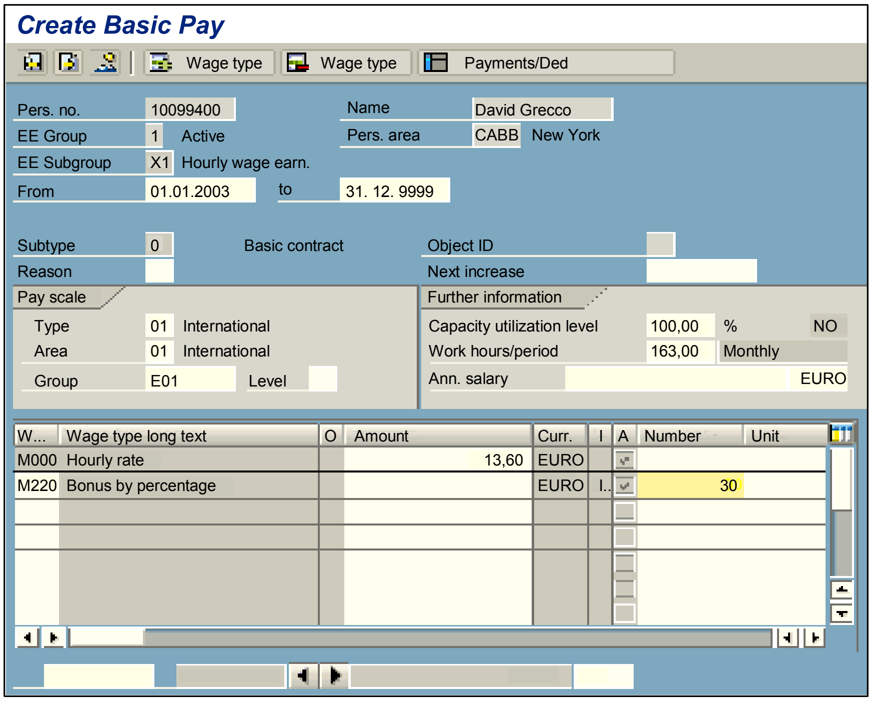
- In the *Addresses* infotype (0006), you can store an employee's address. An employee's address is often used together with the employee's name from the *Personal Data* infotype (0002) in various employee lists, forms, or for address labels.

Planned Working Time



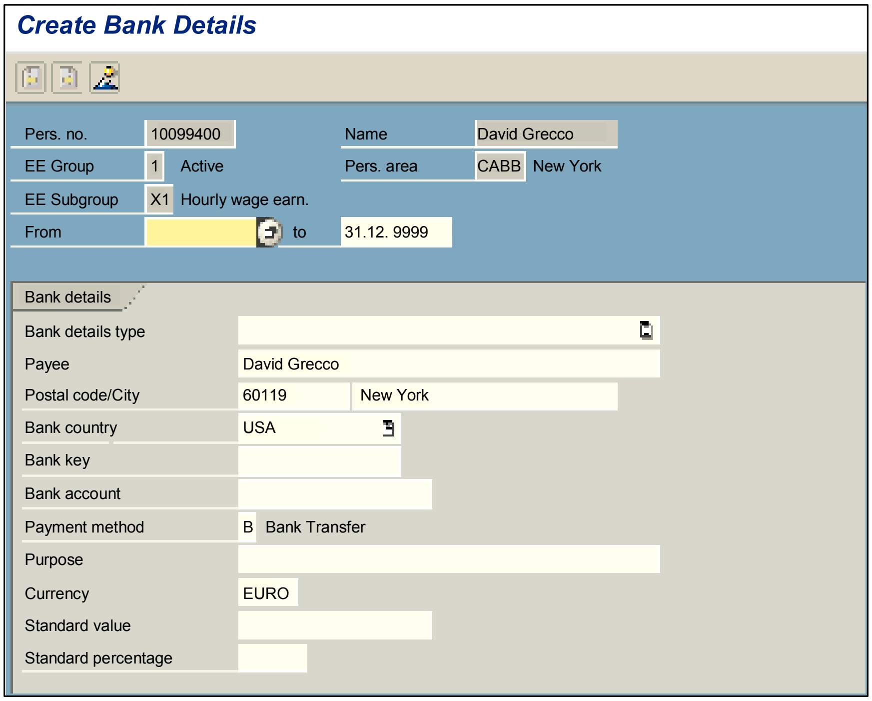
- In the *Planned Working Time* infotype (0007), specify the employee's work schedule rule. This defines the employee's daily, weekly, monthly, and annual working times. In addition, you specify whether the employee's time postings have been evaluated and whether the employee works part-time.

Basic Pay



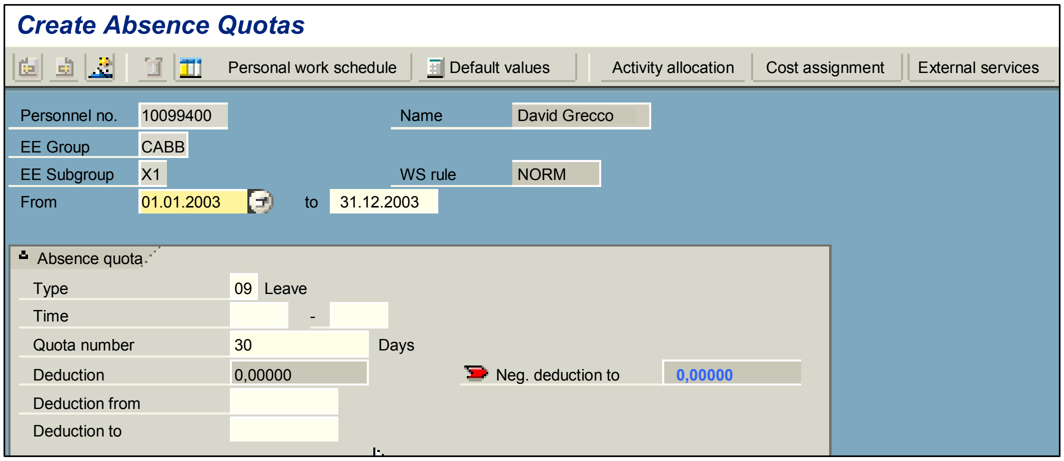
- You store the employee's basic pay in the *Basic Pay* infotype (0008). This is where you record adjustments to the employee's salary.
  Default values are specified for pay scale type and pay scale area in the *Basic Pay* infotype (0008). In addition, you enter the pay scale group and possibly a pay scale level. The system calculates the employee's salary using the default values or the values entered by you.

Bank Details



- In the *Bank Details* infotype (0009), you enter the employee's bank key and account number. The system suggests the employee as the default value for the Payee field.

Absence Quotas



- You store leave entitlements in the *Absence Quotas* infotype (2006). You also store the deduction from and deduction to dates here. You can use the default dates suggested by the system.
- **Note:**
  After you have saved the last infotype in a personnel action, the system jumps back to the initial screen of the personnel action.

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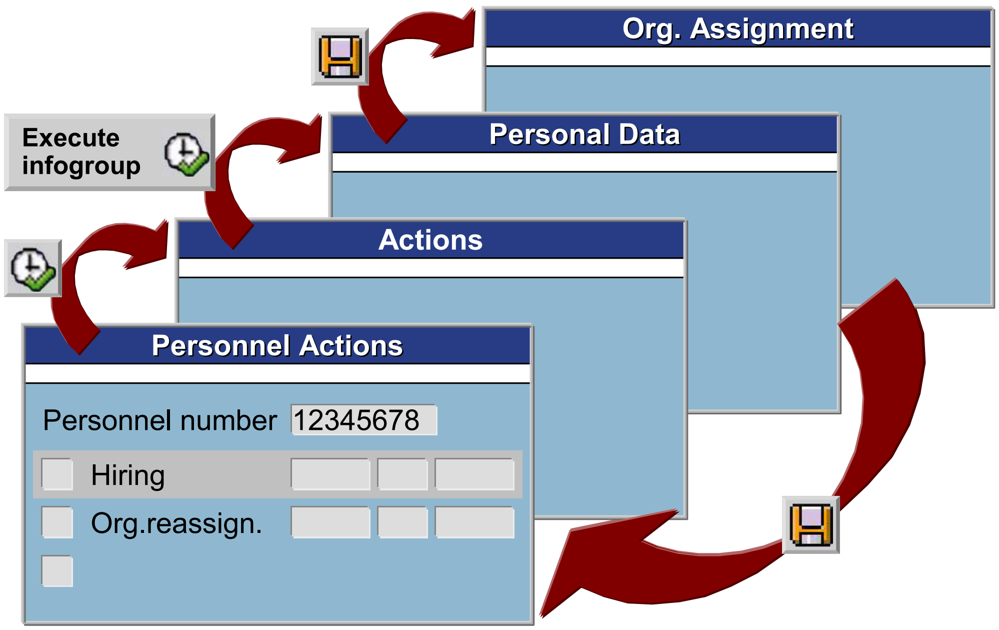
Restarting a Personnel Action



- You can restart a personnel action you have already run once at any time. To do so, select the personnel action you want to restart on the Personnel Actions screen. In the *Actions* infotype (0000), choose *Execute info group*. This takes you to the sequence of infotypes assigned to the action, which you can then maintain. You must save each record that you change. If you do not make any changes, you can simply go to the next record without saving.

Utilities in Master Data Maintenance

Delete personnel number

Change entry/leaving date

Change payroll status

- In master data maintenance, the following options are available in the Utilities menu:
  - **Delete personnel no.**: this enables you to delete personnel numbers from the system for which payroll has not yet been performed.
  - **Change payroll status**: this enables you to manually change the *Payroll Status* infotype (0003). In general, the system always automatically maintains this infotype.
  - **Change entry/leaving date**: this enables you, for instance, to move the start date and end date of all infotypes in the Hiring action simultaneously.

Additional Actions

Hourly wage earner

Salaried employee

1. Change of EE subgroup ***simultaneously*** **2. Change in pay**

Actions (Infotype 0000)

Personnel action

Action type	02	Org.reassignment
Reason for action		

Organizational Assignment

Employee group	1
Employee subgroup	X0
…..	

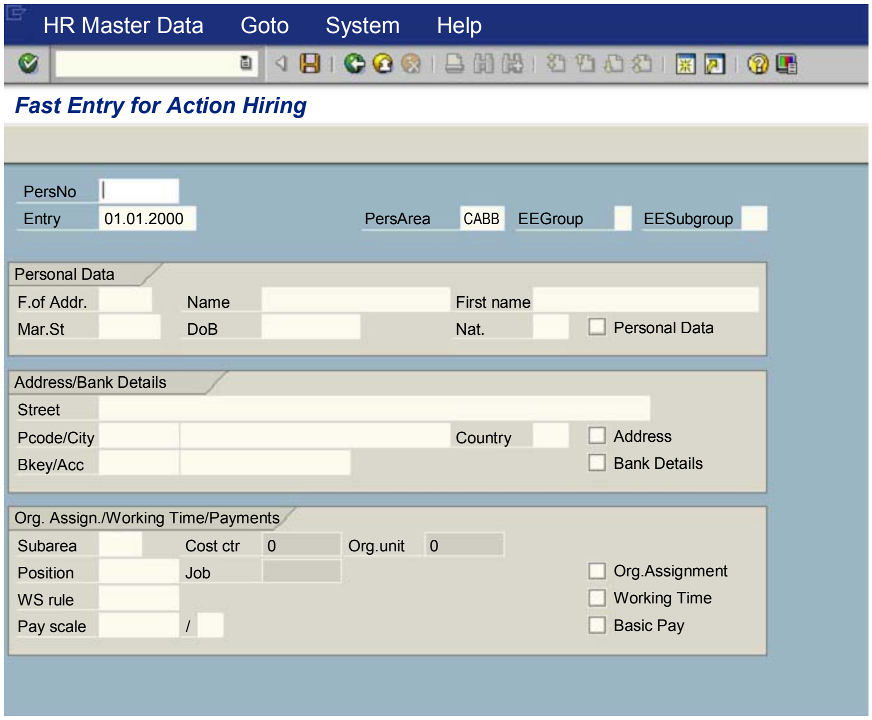
Additional Actions (Infotype 0302)

Personnel action

Action type	16	Change in pay
Reason for action		

- If you need to run more than one personnel action on the same day, you can use the *Additional Actions* infotype (0302). It enables you to log all of the personnel actions that you perform for one employee on the same day. The log includes all of the action types and their action reasons that you performed for an employee on specific dates. This means that you can save more than one data record per day for this infotype.
- You should not store personnel actions that you only use to process more than one infotype in a single info group in the *Actions* infotype (0000). SAP recommends that you use the *Additional Actions* infotype to log such personnel actions. An example of this type of personnel action is Change in Pay. All of the programs that interpret an employee's status, evaluate the *Actions* infotype (0000) only. The *Actions* infotype has time constraint 1, which means that a single infotype record must exist for the entire time that the employee works at your company.

Fast Entry Actions



- The *Fast Entry for Actions* transaction draws together important fields of an action on one screen.
- In Customizing, you define which fields from which infotypes are displayed on the screen.

Personnel Administration: Summary

You are now able to:

- Maintain and view employee data
- Run personnel actions

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Exercises

Unit: Personnel Administration

Topic: Individual Infotype Maintenance

At the conclusion of these exercises, you will be able to:

- Create, copy, change, delimit, and delete individual infotypes of your employees

The data of your employees changes with time. You must keep this data current in the HR system.

1-1 In the Easy Access Menu, create favorites for the *Personnel Actions*, *Maintain*, and *Fast Entry* transactions from the master data area.

1-2 For the work you will do in master data maintenance, you require all employees of your organizational unit ## *Production* time and time again. To make this work easier, save an appropriate selection as a search variant in the Object Navigator of the *Maintain HR Master Data* transaction.

1-3 Display the *planned working time* of Dieter Schulz and record the following values:

Time Management status: ____________________________

Work schedule rule: ____________________________

1-4 In the unit on Time Management, you will be the time administrator responsible for your employees. Maintain the following for Anna Meyer and Dieter Schulz from *January 1 of the current year*: in the *Organizational Assignment* infotype, enter the abbreviation *G##* for the time administrator.

1-5 Anna borrows a book for the next four weeks. Save this event in the *Objects on Loan* infotype and use a loan object number of your choice.

1-6 When reviewing Anna's information, you realize you have an incorrect address for her. Her street and house number should actually be *9750 Lilly Lane*. Correct this error.

1-7 *As of the first day of the current month*, Dieter receives a bonus of ***200 EUR*** on top of his *basic pay*. The bonus is paid using the *DIRECT Bonus* wage type (M230).

1-8 Dieter has established that his address data is not up-to-date. Map the following events in Dieter's master data:

1-8-1 Dieter moved house *today*. His new address is: 32 Hill View, Denver.

1-8-2 *As of January 1 of the current year*, Dieter has a temporary residence. The address is: 23 Main Street, Colorado Springs.

1-8-3 *Today in 4 weeks*, Dieter will give up this temporary residence.

1-9 Use the data in the system to answer the following questions:

1-9-1 What was Anna's monthly wage in June 2002?

__________ Euro

1-9-2 How many data records exist in the system for the *Addresses* infotype for Anna and Dieter on the date specified?

January 12, 2000:	Anna Meyer: _____ / Dieter Schulz: ____
February 5 of the current year:	Anna Meyer: _____ / Dieter Schulz: ____
Today:	Anna Meyer: _____ / Dieter Schulz: ____

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Solutions

Unit: Personnel Administration

Topic: Individual Infotype Maintenance

1-1 In the Easy Access Menu, create favorites for the *Personnel Actions*, *Maintain*, and *Fast Entry* transactions from the master data area.

In the Easy Access Menu, navigate to *Human Resources > Personnel Management > Administration > HR Master Data*.

Click on the *Personnel Actions* transaction with the left mouse key, and drag it to the *Favorites* menu option (at the top of the Easy Access Menu) holding the left mouse key down. Now release the mouse key.

Do the same for the *Maintain* and *Fast Entry* transactions.

1-2 For the work you will do in master data maintenance, you require all employees of your organizational unit *## Production* time and time again. To make this work easier, save an appropriate selection as a search variant in the Object Navigator of the *Maintain HR Master Data* transaction.

Start the *Maintain* transaction from the Favorites menu.

In the Object Navigator, choose the *Search term* search help.

In the *belongs to* field, choose the value *Organizational unit.* In the field beneath the organizational unit, use the F4 help to select the ## *Production* department. To do so, choose the Structure Search tab page and follow the structure: Org.Units Training Group > Training International > Warehouse and Production > ##Production. Confirm your selection with *Enter*.

Check whether both personnel numbers 100991## (Anna Meyer) and 100992## (Dieter Schulz) are included in the selection list. If they are not, perform the selection again.

Choose *Create search variant* to save your search as a variant. Use a name of your choice, for example *Weekday*.

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1-3 Display Dieter's *planned working time* and record the following values:

Stay in the transaction you have already called and select the person *Dieter Schulz* (by double-click) from the selection area of the Object Navigator.

Choose the *Empl. Contract data* tab page and select the *Planned Working Time* infotype. You select an infotype by clicking on the box in front of the infotype text.

In the application toolbar, choose *Display*.

Time Management status: ***No time evaluation***

Work schedule rule: ***Norm***

Choose *Back* to finish editing the infotype.

1-4 In the unit on Time Management, you will be the time administrator responsible for your employees. Maintain the following for Anna and Dieter from *January 1 of the current year*: in the *Organizational Assignment* infotype, enter the abbreviation *G##* for the time administrator.

In the selection area of the Object Navigator, select the person *Anna Meyer* (by double-click).

Choose the *Empl. Contract data* tab page and select the *Organizational Assignment* infotype.

In the application toolbar, choose *Copy*.

In the *Start* field, enter January 1 of the current year.

In the *Time* field, enter the value *G##* and save your entries. To do so, choose *Save* in the application toolbar.

Confirm the warning message with *Enter*.

Repeat this procedure for *Dieter Schulz*.

1-5 Anna borrows a book for the next four weeks. Save this event in the *Objects on Loan* infotype and use a loan object number of your choice.

In the selection area of the Object Navigator, select the person *Anna Meyer* (by double-click).

In the *Infotype* field, enter the term *Objects on Loan* and choose *Create*.

Enter the relevant dates as the *validity period*. You can use the F4 help if you want to.

Use the F4 help in the *Object on loan* field to select the value *Books*.

In the *Number* field, enter the value *1*.

Use the F4 help in the *Unit* field to select the value *Piece*.

In the *Loan object no.* field, enter a *value of your choice*.

Save your entries.

1-6 When reviewing Anna's information, you realize you have an incorrect address for her. Her street and house number should actually be *9750 Lilly Lane*. Correct this error.

Choose the *Core Employee Info* tab page and select the *Addresses* infotype.

In the application toolbar, choose *Change*.

Change the house number from *9750* to *9570*.

Save your entries.

1-7 *As of the first day of the current month*, Dieter receives a bonus of *200 EUR* on top of his *basic pay*. The bonus is paid using the *DIRECT Bonus* wage type (M230).

In the selection area of the Object Navigator, select the person *Dieter Schulz* (by double-click).

Choose the *Gross/net payroll* tab page and select the *Basic Pay* infotype.

In the application toolbar, choose *Copy*.

In the *Start* field, enter the *first day of the current month* as the start date of the data record.

In the second line of the *Wage type* field, use the F4 help to select the *M230 DIRECT Bonus* wage type. In the *Amount* field, enter the value *200*.

Save your entries.

1-8 Dieter has established that his address data is not up-to-date. Map the following events in Dieter's master data:

In the selection area of the Object Navigator, select the person *Dieter Schulz* (by double-click).

Choose the *Core Employee Info* tab page and select the *Addresses* infotype.

1-8-1 Dieter moved house *today*. His new address is: 32 Hill View, Denver.

In the *Period* area, select the option *From today*.

In the application toolbar, choose *Create*.

In the *Address type* field, choose the value *Permanent residence*.

In the fields *House number/street*, *postal code/city*, and *District*, enter the address data specified above.

Save your entries.

1-8-2 *As of January 1 of the current year*, Dieter has a temporary residence. The address is: 23 Main Street, Colorado Springs.

In the *Period* area, select the option *Period* and enter January 1 of the current year as the start date and December 31, 9999 as the end date.

In the application toolbar, choose *Create*.

In the *Address type* field, choose the value *Temporary residence*.

In the fields *House number/street*, *postal code/city*, and *District*, enter the address data specified above.

Save your entries.

1-8-3 *Today in 4 weeks*, Dieter will give up this temporary residence.

In the application toolbar, choose *Delimit*.

In the *Delimit.Date* field, enter the date *specified above*.

Select the data record you want to delimit by choosing the box in front of the line for temporary residence.

In the application toolbar, choose *Delimit*.

1-9 Use the data in the system to answer the following questions:

1-9-1 What was Anna's monthly wage in June 2002?

In the selection area of the Object Navigator, select the person *Anna Meyer* (by double-click).

Choose the *Gross/net payroll* tab page and select the *Basic Pay* infotype.

In the *Period* area, select the option *All*.

In the application toolbar, choose *Overview*.

In the data record valid in June 2002, you find the value 2,950.00 euro.

1-9-2 How many data records exist in the system for the *Addresses* infotype for Anna and Dieter on the date specified?

January 12, 2000: Anna Meyer: _____ / Dieter Schulz: ____

In the selection area of the Object Navigator, select the person *Anna Meyer* (by double-click).

Choose the *Core Employee Info* tab page and select the *Addresses* infotype.

In the application toolbar, choose *Overview*.

In the *Choose* field, enter the value *January 12, 2000* as the *start date and end date*.

Record the number of data records on your exercise sheet.

Exit the overview by choosing *Back*.

In the selection area of the Object Navigator, select the person *Dieter Schulz* (by double-click).

In the application toolbar, choose *Overview*.

In the *Choose* field, enter the value *January 12, 2000* as the *start date and end date*.

Record the number of data records on your exercise sheet.

Exit the overview by choosing *Back*.

February 5 of the current year: Anna Meyer: _____ / Dieter Schulz: ____

Repeat the procedure just detailed for the date February 5 of the current year.

Today: Anna Meyer: _____ / Dieter Schulz: ____

Repeat the procedure just detailed for today's date.

Exercises

Unit: Personnel Administration

Topic: Fast Entry

At the conclusion of these exercises, you will be able to:

- Use fast entry to save data for several persons simultaneously

In the previous exercises, you learned how to change the data of individual persons. Now you are going to learn how to save data for several persons simultaneously.

2-1 Your supervisor approaches you and asks you to enter the following bonuses in the system under *today's date*: You are to enter the bonuses as *additional payments* for wage type *5000*.

2-1-1 Anna Meyer (100 99 1 ##) receives a 500 euro bonus.

2-1-2 Dieter Schulz (100 99 2 ##) receives a 300 euro bonus.

2-1-3 Simone Kopp (100 99 3 ##) receives a 250 euro bonus.

2-2 All employees in the ## Executive Board (Org.Units Training Group > Training International > Executive Board > ## Executive Board) and the underlying departments receive a 150 euro bonus. Here, you are also to enter this bonus as an *additional payment* for wage type *5000* under *today's date*.

... Optional Exercises

2-3 Ensure that all bonuses entered this way are also booked in the *Additional Payments* infotype for the persons in question.

Solutions

Unit: Personnel Administration

Topic: Fast Entry

2-1 Your supervisor approaches you and asks you to enter the following bonuses in the system under *today's date*: You are to enter the bonuses as *additional payments* for wage type *5000*.

2-1-1 Anna Meyer (100 99 1 ##) receives a 500 euro bonus.

2-1-2 Dieter Schulz (100 99 2 ##) receives a 300 euro bonus.

2-1-3 Simone Kopp (100 99 3 ##) receives a 250 euro bonus.

Start the *Fast Entry* transaction from the *Favorites* menu.

Select the *Additional Payments* infotype and the period *Today*. Under *Enter Personnel Numbers*, ensure that the *Enter in fast entry screen* option is selected.

In the application toolbar, choose *Create*.

Enter the following values in the list screen that appears:

Personnel Number	Wage Type	Amount
100 99 1 ##	**5000**	**500**
100 99 2 ##	**5000**	**300**
100 99 3 ##	**5000**	**250**

In the application toolbar, choose *Save*.

Return to the initial screen of the *Fast Entry* transaction by choosing *Back*.

2-2 All employees in the ## Executive Board (Org.Units Training Group > Training International > Executive Board > ## Executive Board) and the underlying departments receive a 150 euro bonus. Here, you are also to enter this bonus as an *additional payment* for wage type *5000* under *today's date*.

Select the *Additional Payments* infotype and the period *Today*. Under *Enter Personnel Numbers*, ensure that the *Preselect using report* option is selected.

In the application toolbar, choose *Create with proposal*.

Choose *Org Structure*. Select the organizational unit specified in the exercise and confirm with *Enter*.

Start the selection report by choosing *Execute*.

Check the selection result (the search should find 7 persons) and choose *Create with proposal*.

In the *Wage type* field, add the value *5000* and in the *Amount* field the value *150*. Then choose *Next screen*.

In the application toolbar, choose *Save*.

... Optional Exercises

2-3 Ensure that all bonuses entered this way are also booked in the *Additional Payments* infotype for the persons in question.

Exit the *Fast Entry* transaction and start the *Maintain* transaction from your favorites.

Display the *Additional Payments* infotype for the personnel number used above. (Compare exercise/solution 1-3)

Exercises

Unit: Personnel Administration

Topic: Personnel Action

At the conclusion of these exercises, you will be able to:

- Map various events in the system using personnel actions

Often, an event requires you to change several infotype records one after the other. You can use actions to do this.

3-1 Simone Kopp (100 99 3 ##) changes position to *## Senior Product Designer* on January 1 of the current year. Run the *Change of position* action for Simone.

Actions infotype: in the Position field, select the new position *## Senior Product Designer*. You do so under *Org.Units Training Group > Training International > Production > ## Production*.

Organizational Assignment infotype: check the data and save the data record. Do **not** create a vacancy for the old position but delimit the vacancy for the new position.

Planned Working Time infotype: save the data record without making any changes.

Basic Pay infotype: place Simone in pay scale group E03, pay scale level 01 and save the data.

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3-2 Hans Kemm (100 99 4 ##) joined your company on January 1 of this year and fills the position ## *Production Worker B*. Use the action *Hiring HR100* to enter data and maintain the required infotypes.

Actions infotype: hire Hans for the position Org.Units Training Group > Training International > Production > ## Production > ## Production Worker B in personnel area CABB, employee group 1 and employee subgroup X1.

Personal Data infotype: Hans Kemm, date of birth March 15, 1960.

Organizational Assignment infotype: maintain personnel area 0005 and G## as time administrator for time recording, and save the data. Delimit the vacancy for the new position.

Addresses infotype: enter values of your choice here.

Planned Working Time infotype: save the default values without making any changes.

Basic Pay infotype: place Hans in pay scale group E01, pay scale level 01.

Bank Details infotype: Hans has an account with the Overseas Bank in Denver (bank key: 67292200). Enter an account number of your choice.

Absence Quotas infotype: save the default absence quota without making any changes.

Optional Exercises

3-3 In your own words, explain the difference between the *Personnel Actions* and *Fast Entry: Actions* transactions.

____

____

____

____

____

____

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Solutions

Unit: Personnel Administration

Topic: Personnel Action

3-1 Simone Kopp (100 99 3 ##) changes position to ## *Senior Product Designer* on January 1 of the current year. Run the *Change of position* action for Simone.

Start the *Personnel Actions* transaction from the *Favorites* menu.

In the *Personnel no*. field, enter the value *100993##*.

In the *From* field, enter *January 1 of the current year* as the date.

Select the *Change of position* action.

Choose *Execute*.

The *Actions* infotype appears. Use the F4 help in the *Position* field and then the structure search to select the position ## Senior Product Designer and confirm with *Enter*. You select this position under Org.Units Training Group > Training International > Production > ## Production.

Choose *Save* and confirm the warning message in the status bar with *Enter*.

The *Organizational Assignment* infotype now appears. Save this data record with the new position, which has already been entered, and confirm the warning message in the status bar with *Enter*.

In the dialog box that appears for creating the vacancy of the position soon to become available, choose *NO*.

Confirm the dialog box that appears for delimiting the vacancy of the new position with *Yes*.

The *Planned Working Time* infotype appears. Do not make any changes here and save the infotype record by choosing *Save*. Confirm the warning message in the status bar with *Enter*.

The *Basic Pay* infotype appears. In the *PS group* field, enter the value *E03* and in the *Level* field, the value *01*. Confirm your entries and the following warning message with *Enter*. You now see the new monthly wage. Save your entries by choosing *Save*.

The *Personnel Actions* transaction appears again.

3-2 Hans Kemm (100 99 4 ##) joined your company on January 1 of this year and fills the position ## *Production Worker B*. Use the action *Hiring HR100* to enter data and maintain the required infotypes.

In the *Personnel no*. field, enter the value *100994##*.

In the *From* field, enter *January 1 of the current year* as the date.

Run the action *Hiring HR100*.

The *Actions* infotype appears. Use the F4 help in the *Position* field to select the position ## Production Worker B. You select this position under Org.Units Training Group > Training International > Production > ## Production. Fill the *Personnel area*, *Employee group,* and *Employee subgroup* fields with the values *CABB*, *1*, and *X1*, and save your entries.

The *Personal Data* infotype appears. Enter Hans' data, born on March 15, 1960, and save your entries.

The *Organizational Assignment* infotype now appears. In the *Pers.area* field, enter the value *0005* and in the *Time* field, the value *G##* and save the data record. Confirm the dialog box that appears for delimiting the vacancy with *Yes*.

The *Addresses* infotype appears. Enter values of your choice here and save the data record.

The *Planned Working Time* infotype appears. Do not make any changes here and save the data record.

The *Basic Pay* infotype appears. In the *PS group* field, enter the value *E01* and in the *Level* field, the value *01* and save the data record.

The *Bank Details* infotype appears. In the Bank key field, enter the value *67292200*. Enter a value of your choice in the *Bank account number* field and save the data record.

The *Absence Quota* infotype appears. Do not make any changes here and save the data record.

The *Personnel Actions* transaction appears again.

Time Management

Contents:

- Basics of Time Management
- Recording Time Data
- Evaluating Time Data
- Shift Planning
- Cross-Application Time Sheet (CATS)

Time Management: Unit Objectives

At the conclusion of this unit, you will be able to:

- **Describe the basic elements of Time Management**
- **Record time data using the Time Manager's Workplace (TMW)**
- **Run time evaluation and correct errors**
- **Explain Shift Planning**
- **Describe the concept of the Cross-Application Time Sheet and enter time data**

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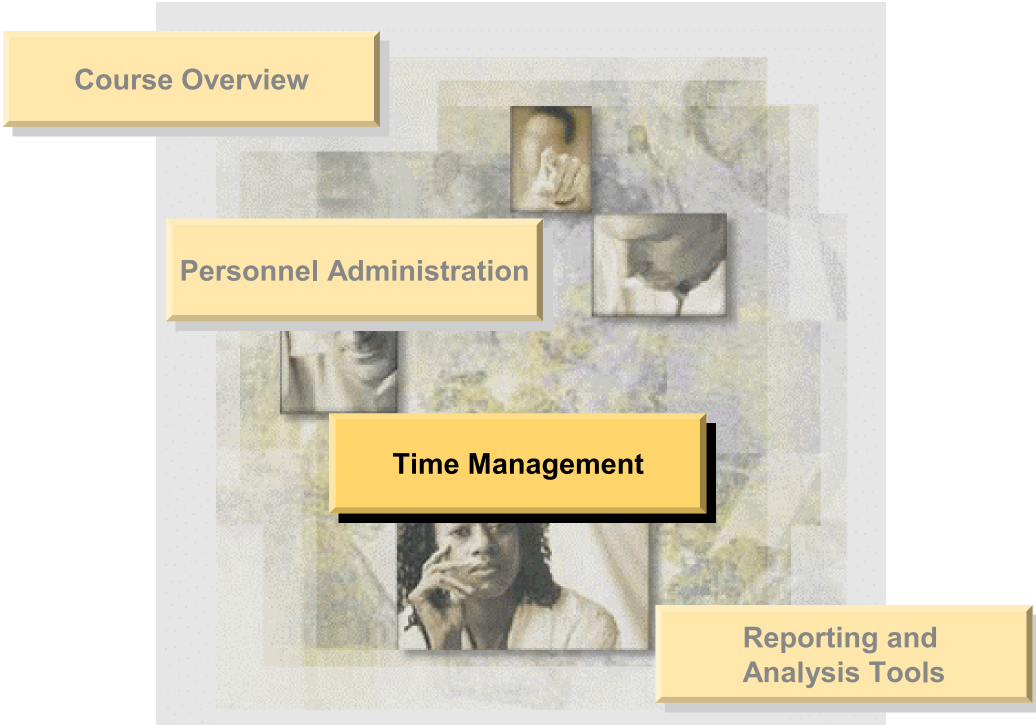
Time Management: Overview Diagram



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Time Management: Business Scenario

Part A: Basics of Time Management

- **After Time Management is implemented you acquaint yourself with the key terms and concepts.**

Part B: Entering Time Data

- **The time administrator records only exceptional time data, such as an employee’s illness.**

Part C: Evaluating Time Data

- **The time events entered at time recording terminals are evaluated by Time Evaluation.**

Part D: Shift Planning

- **Employees’ shifts are scheduled based on predefined requirements for some departments of your enterprise.**

Part E: Cross-Application Time Sheet (CATS)

- **Your company’s field employees use the Cross-Application Time Sheet to record their data.**

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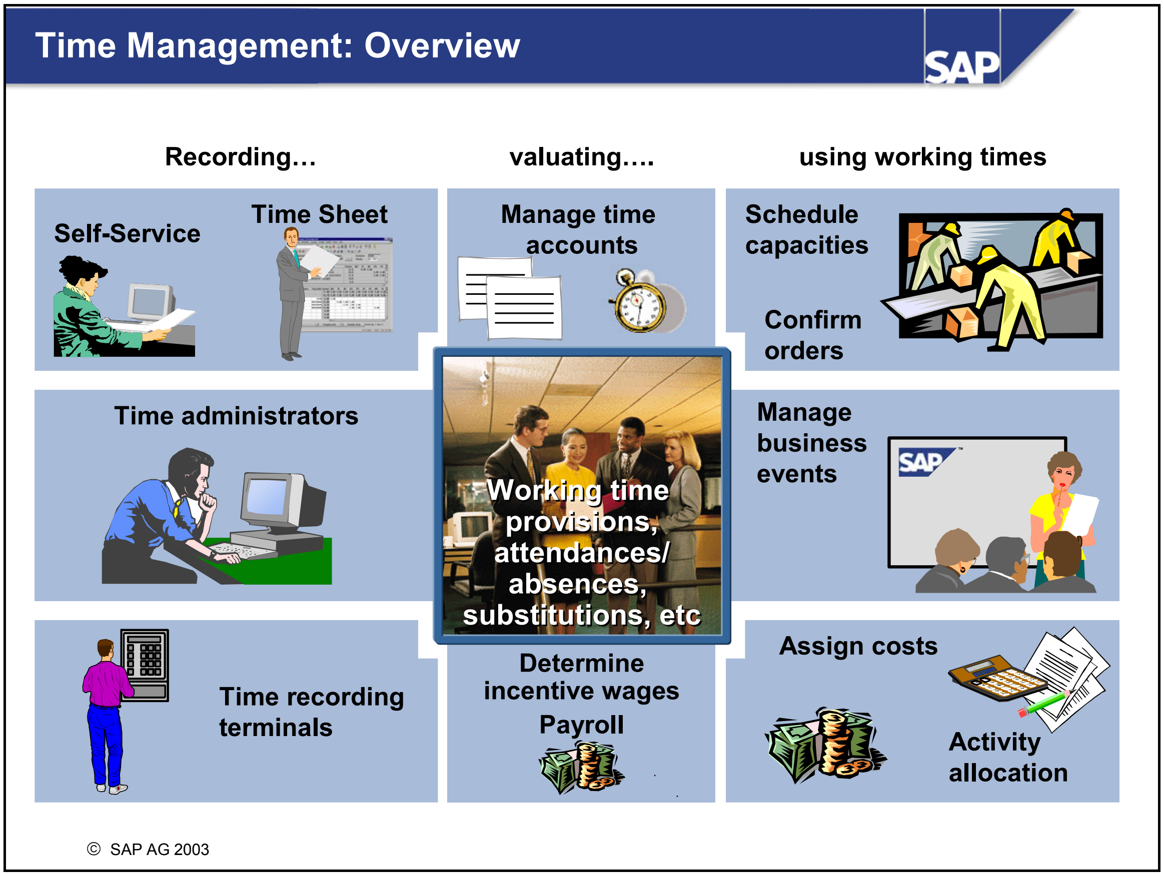
Time Management: Structure

- Part A: Basics of Time Management
- Part B: Entering Time Data
- Part C: Evaluating Time Data
- Part D: Shift Planning
- Part E: Cross-Application Time Sheet (CATS)



- Evaluating work performed by employees and determining employee availability are essential elements within an enterprise for a human resources system. This information is also relevant for other areas, such as Controlling and Logistics, and is a factor that influences enterprise-wide decisions.
- R/3 Time Management allows you to display and record working times flexibly.
- Information on working times is used to calculate gross wages in Payroll.
- Several options are available for recording working times, including Time Manager's Workplace, a central time sheet, online menus, time recording systems, and Employee Self-Service (ESS) applications.
- You can manage time accounts (such as leave, flextime) manually or automatically.
- Working times can be used for activity allocation in Controlling. Costs generated by the working times can be assigned according to their source in Controlling.
- Information from Time Management is used in Logistics to determine employees' availability for capacity requirements planning.
- You can determine work requirements for the enterprise and plan employee shifts.

Planned Working Time Infotype

The core time management infotype: *Planned Working Time (0007)*

Work schedule rule
When is the employee scheduled to work?

Work schedule rule	STD

Time Mgmt status
Is the employee included in time evaluation?

Time Management status	0	No time evaluation

- Employee planned working time is assigned in the *Planned Working Time* infotype (0007) using work schedule rules.
- Planned working time is defined in a business environment as the daily working period from start to end time, excluding breaks. By defining the planned working time for your employees, you determine how long they must work in your enterprise on a daily basis.
- Information on working time specific to a particular employee is represented in his or her personal work schedule. The personal work schedule contains the deviations from and exceptions to an employee's working time that have been recorded.

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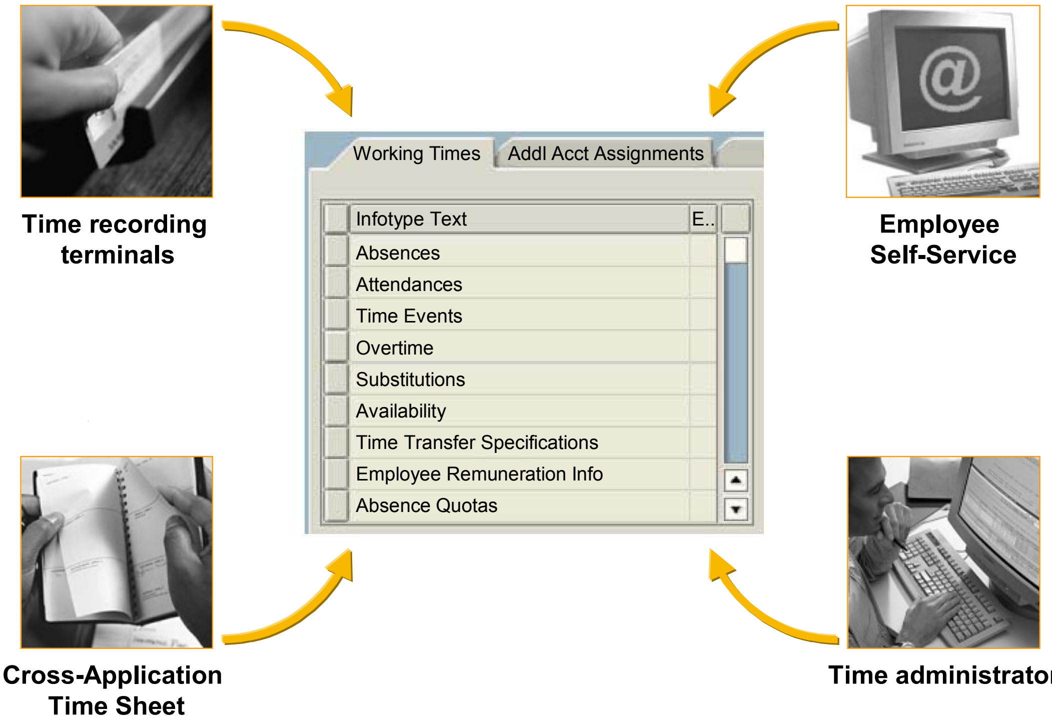
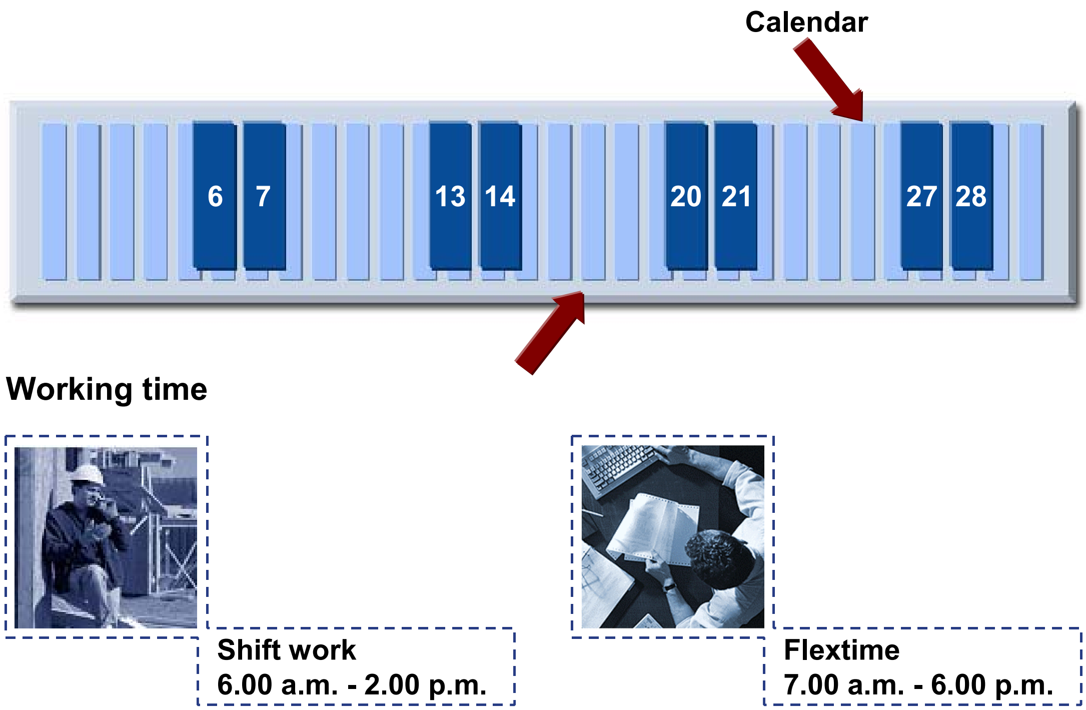
Recording Data in Time Management

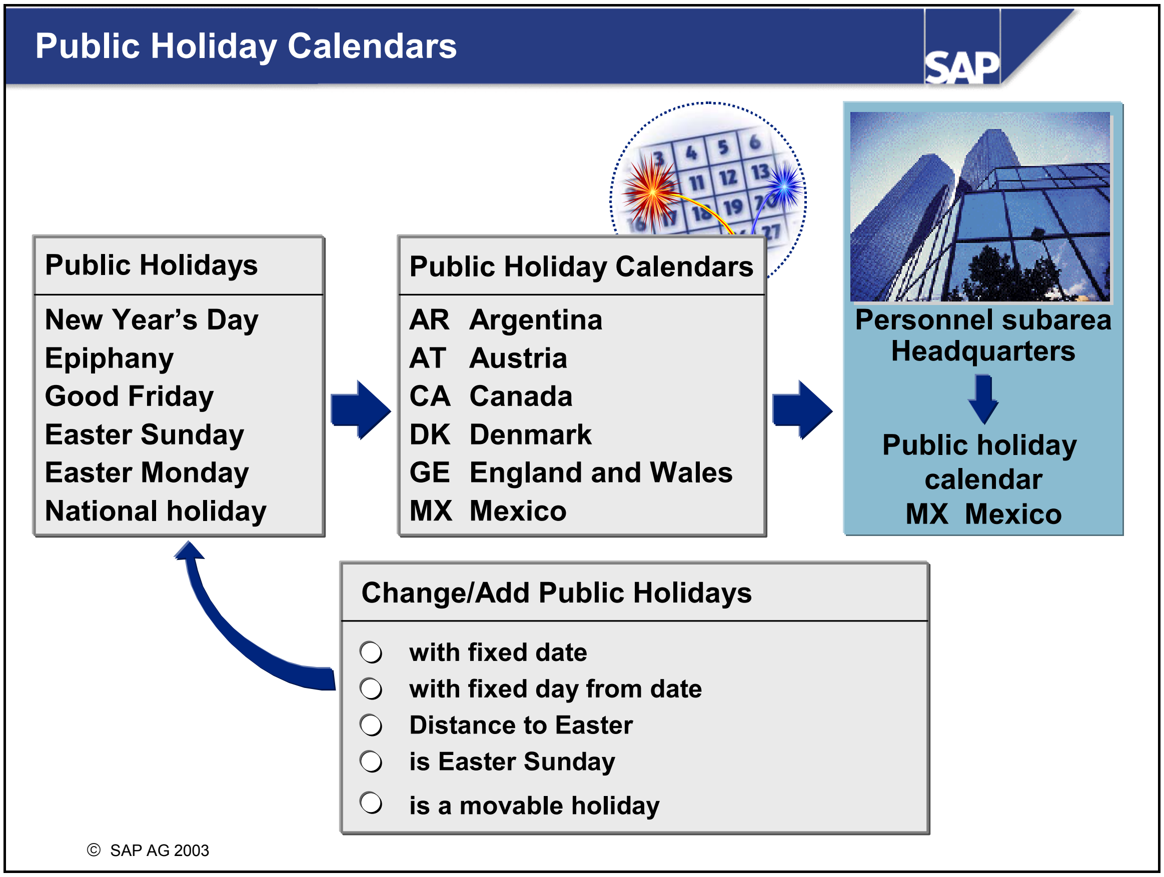


- To record employee times in *Time Management*, such as hours worked, business trips, leave, or substitutions, you can use a variety of systems and methods, such as:
  - Online by time administrators
  - Separate time recording systems
  - Cross-Application Time Sheet (CATS)
  - Employee Self-Service (ESS) applications, such as Internet applications, Workflow forms, or touch-screen systems
  - Customer systems with an interface to the R/3 System
- Time data, such as listed above, is stored in infotypes. A personnel or time administrator records this data in various ways:
  - Time Manager’s Workplace: administer data for a group of employees
  - Maintain individual infotypes: record and change data through infotype screens
  - Fast entry: enter data for one infotype for multiple employees simultaneously

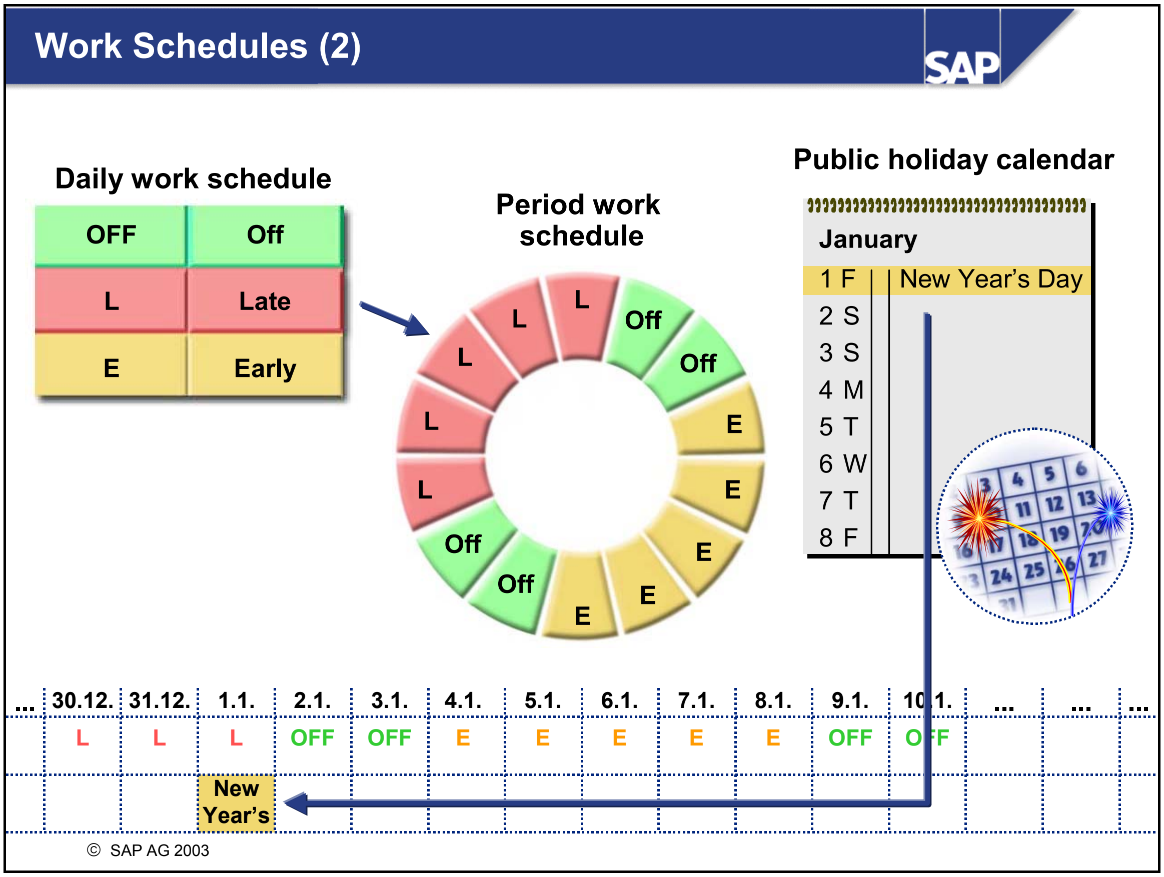
Work Schedules (1)



- The employee work schedule is an integral part of *Time Management.* It contains the planned specifications for an employee's working time.



- The standard system already contains public holiday calendars that include regional public holidays. You can change existing and define new public holidays in the public holiday list. In addition, you can change existing or define new public holiday calendars. You assign a public holiday calendar to a personnel subarea.
- Public holidays are taken into account when determining bonuses or calculating leave, for example.



- An employee's planned working time is represented in a work schedule. The work schedule is generated from a period work schedule and a public holiday calendar. The period work schedule comprises a set sequence of daily work schedules. The daily work schedule contains information on a day's working time including breaks. The sequence can reflect regular and variable working times. The period work schedule is applied to the calendar. The work schedule rule encompasses all the specifications required to define the work schedule.
- The work schedule is used as the basis for time data evaluation.
- Examples:
  - The work schedule shows how many hours salaried employees must work to be entitled to their full salary. Depending on the specifications defined for the individual employee, any additional hours worked are identified as overtime in *Time Evaluation*.
  - If you only record deviations to the work schedule, planned working time is used as the basis for time evaluation.
- You assign a work schedule to an employee in the *Planned Working Time* infotype (0007) using a work schedule rule.
- You can branch from the *Planned Working Time* infotype to the personal work schedule.

Recording Time Data

Method 1: *Negative time management*

Recording only deviations from the work schedule

Actual times = Work schedule + deviations
Planned times = Work schedule

Doctor's appt	11:00	14:00

Method 2: *Positive time management*

Recording all time events

Actual times = Recorded times
Planned times = Work schedule

Attendance	08:00	11:00
Doctor's appt	11:00	14:00
Attendance	14:00	17:00

- You can use two different methods to record employee time data in the SAP System:

  1. Recording only deviations from the work schedule

     In this method, you record time data for employees only when their working times deviate from those assigned in their work schedules. You can record employee data, such as an illness, schedule and record substitutions, and enter an employee's standard annual leave.

  2. Recording all actual times

     In this method, you record all actual times, that is, all types of occurrences such as the hours an employee actually worked, absences, and so on. There are two ways to record actual times:

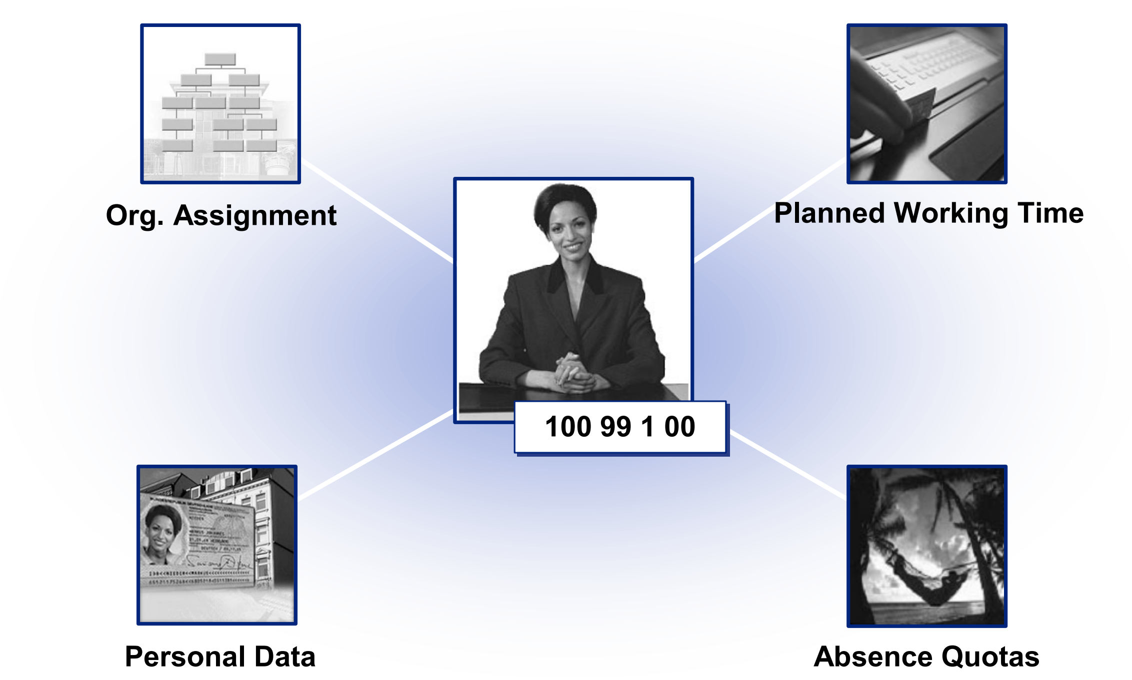
     Automatic recording
     You can record actual times using separate time recording systems. The data is then uploaded to the R/3 System, where it is processed in Time Evaluation.

     Manual recording
     You can also record actual times manually in the *Attendances* infotype (2002).

Time Management: Structure

- Part A: Basics of Time Management
- **Part B: Entering Time Data**
- Part C: Evaluating Time Data
- Part D: Shift Planning
- Part E: Cross-Application Time Sheet (CATS)

Required Infotypes for Negative Time Management



- In *SAP Time Management*, there are certain master data infotype records that you must create for every employee. Time management data is stored in the same master data records used by other HR areas, such as *Payroll* or *Personnel Planning and Development*.
- The following master data infotypes are required for *negative time management*:
  - *Organizational Assignment* (0001)
  - *Personal Data* (0002)
  - *Planned Working Time* (0007)
  - *Absence Quotas* (2006)

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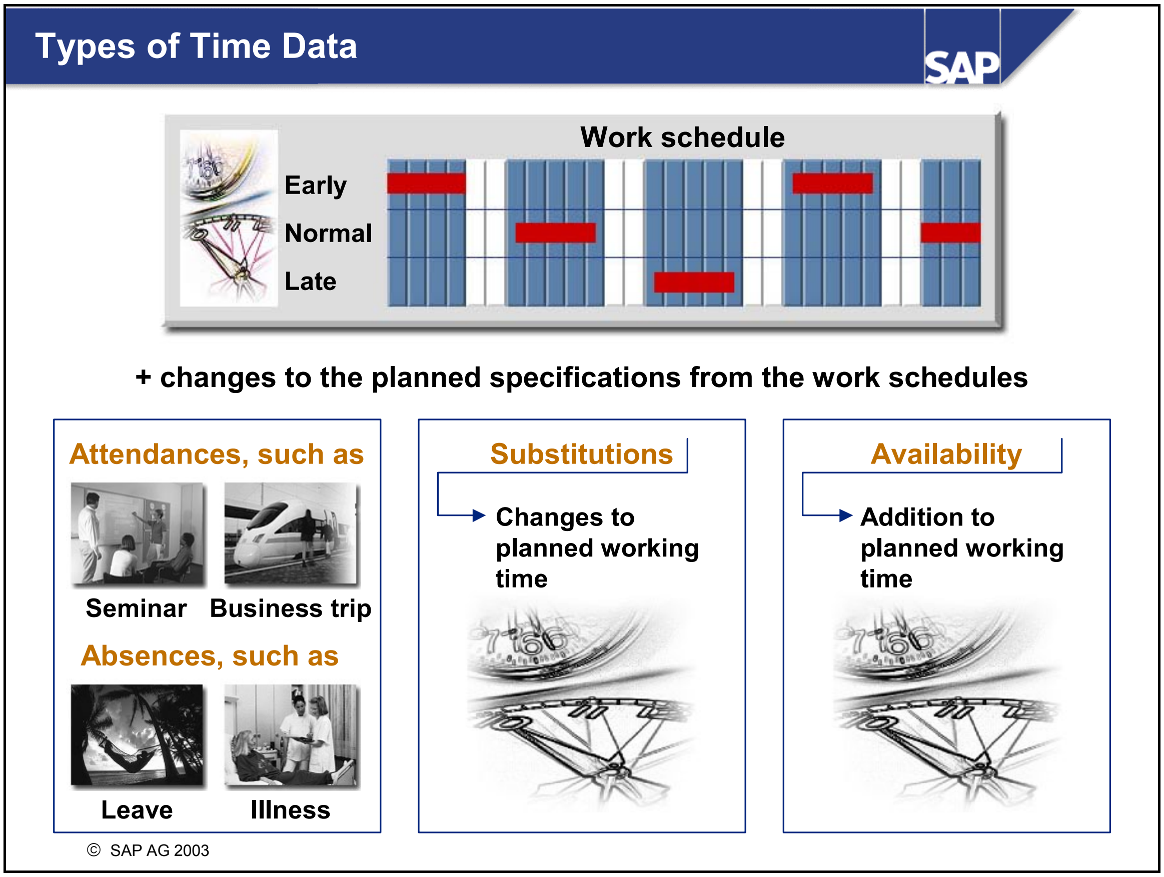
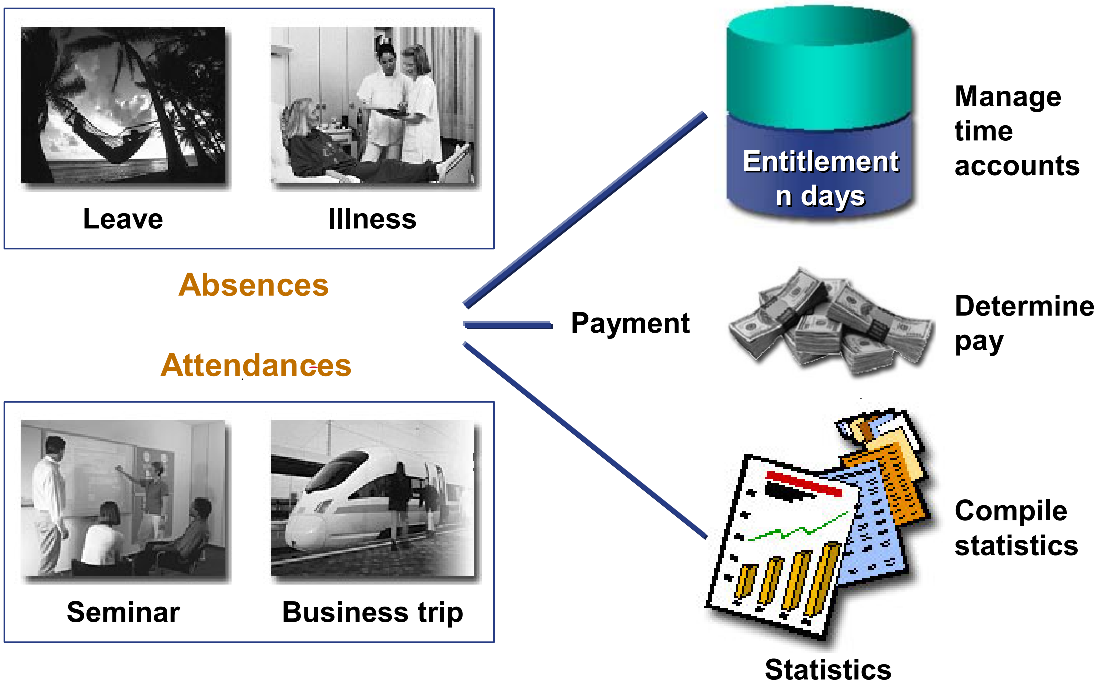
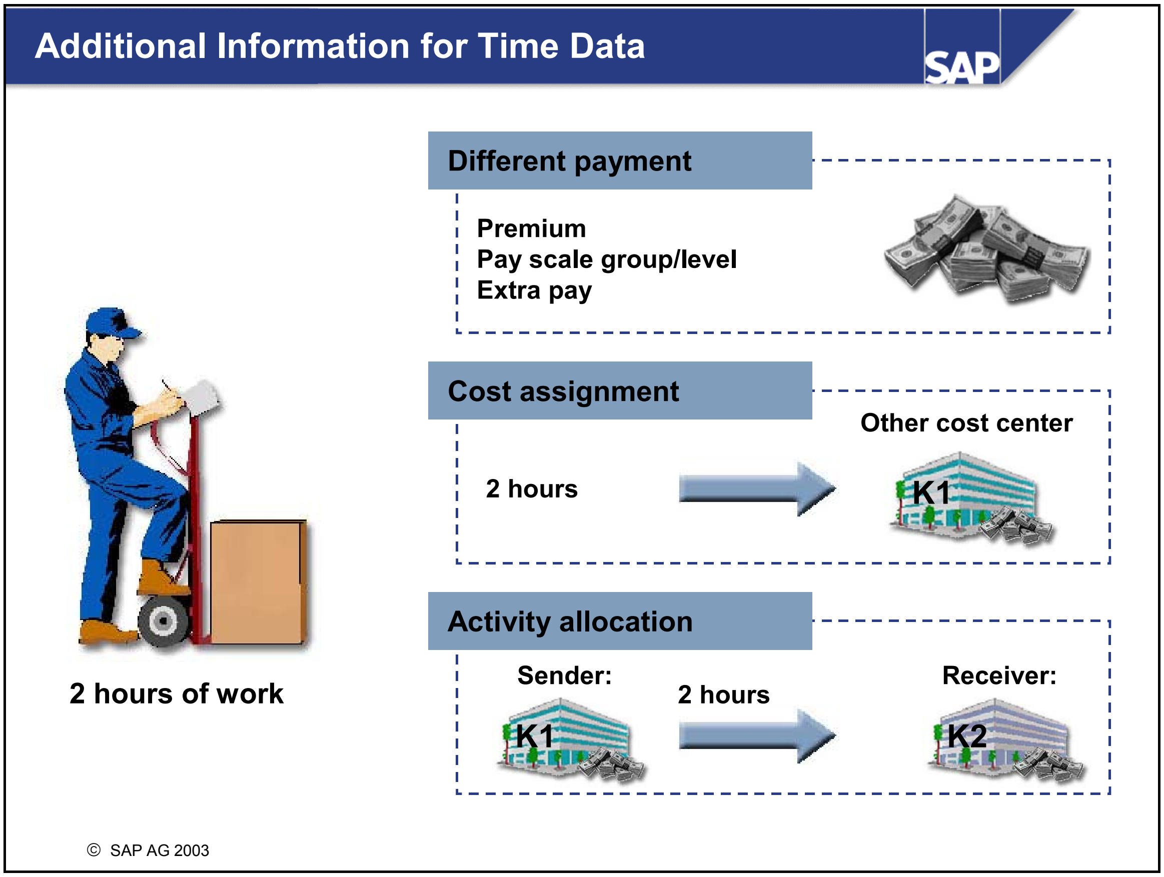


- Valuation and remuneration of employee working time is based on time data recording.
- As of SAP R/3 Release 4.6C, you record deviations from or exceptions to an employee's work schedule in the Time Manager's Workplace. This information is then stored in the appropriate infotypes.
- Examples of employee time data are hours worked, leave, illness, overtime, substitutions, and business trips.

Attendances and Absences



- Employee attendances can be business trips, participation in seminars, hours worked, or teaching a training course. Attendances are entered in the Time Manager's Workplace using the relevant time data IDs. The information is stored in the *Attendances* infotype (2002), which is subdivided into various attendance types (subtypes).
- Overtime - that is, the time an employee works over and above the planned working time stipulated in the daily work schedule - is also entered in the Time Manager's Workplaces as an attendance. *Time Evaluation* calculates overtime automatically on the basis of the complete actual times.
- An employee's absences may include leave or illness. Absences are calculated on the basis of an employee's personal work schedule. Absences are stored in the *Absences* infotype (2001), which is subdivided into various absence types (subtypes).
- Attendances and absences can be partial-day, full-day, or for several days. You determine this in Customizing.
- Attendances and absences can be deducted from entitlements, or quotas, as they are known. Examples of this are the standard annual leave, overtime approvals, or entitlements to further training. Some attendances and absences can influence an employee's remuneration; others have a purely statistical function.



- You can set up a different payment in various time management infotypes (such as Attendances, Absences, Availability) to stipulate the following types of compensation:
  - Bonus (premium) as supplemental remuneration
  - A different payment by assigning a rate (deviating from the employee's regular rate)
  - Remuneration with information about the position (specific payment for a certain position)
  - Bonus or deduction of concrete amounts using the extra pay indicator and the valuation basis
- Actual personnel costs can be allocated either to the employee's main cost center or to another one through an order. You can customize which information can be entered with the time data.
- Activities performed in an enterprise can be allocated internally. Activities to be allocated internally include employees' time data, for example, when employees work for another department. If these times (activities) are to be allocated between cost centers, you enter a receiver cost center as well as an activity type for valuating the activity performed. The activity type allows you to valuate the activity with an internal allocation rate in Controlling. The sender cost center (usually the employee's master cost center) is credited and the receiver cost center is debited.

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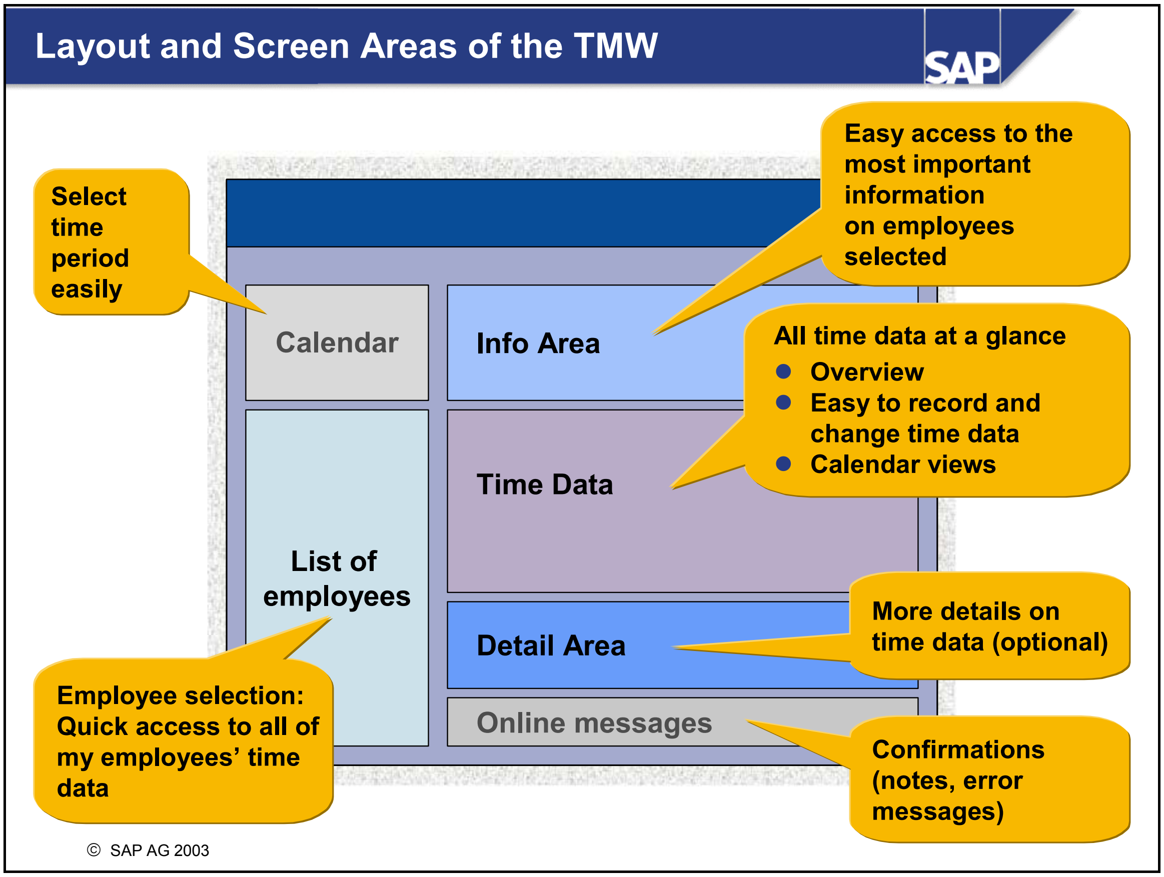

- The *Time Data Maintenance* and *Message Processing* tasks are delivered in the ***Time Manager's Workplace*** in the standard system. The layout of the screen areas for the *Time Data Maintenance* task is displayed in the slide above. The layout is similar for the ***Message Processing*** task.
- The **Calendar** is used to select the time period for which time data is to be entered.
- The **Employee List** contains the employees assigned to the time administrator. Time administrators can select the employee or employees from this list for whom they want to enter or change time data.
- They can display additional information for any selected employee in the ***Info Area*** (such as details on master data or time accounts).
- In the **Time Data** screen area, you enter and maintain time data using intuitive time data IDs (such as "I" for illness or "L" for leave).
- Any additional specification for the time data can be entered in the ***Details*** area (such as activity allocation specifications for an attendance), if required. Information on time data recorded is also visible in the **Details** area (person who entered the data, date on which data was entered, and so on).
- The **Messages** area contains any messages or confirmations on time data entered by the time administrators. These messages can be informational, warnings, or error messages.

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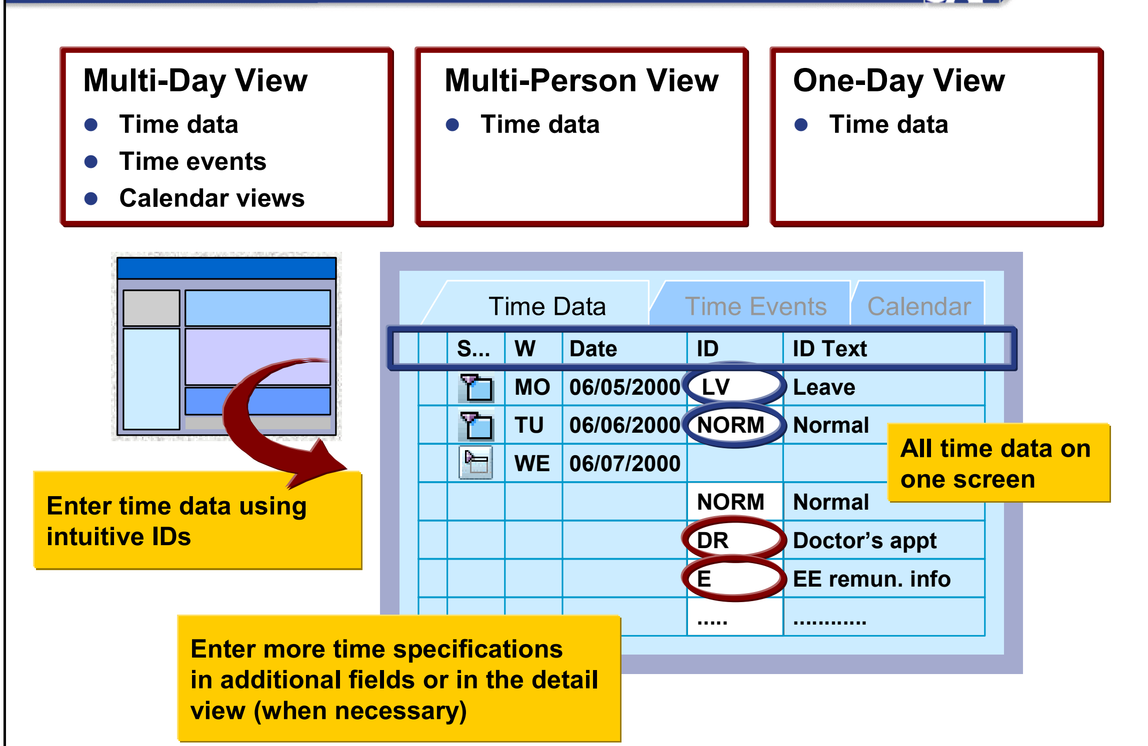
Recording Time Data



- The Time Manager‘s Workplace is a task-oriented user interface for maintaining time data and processing evaluation messages. This interface is specifically designed to meet the needs of time administrators in decentralized departments.
- The screen and functions displayed in the Time Manager’s Workplace can be adjusted for your time administrators by using profiles to meet their task-specific requirements. The Time Manager‘s Workplace is always called using a profile that determines:
  - Which employee selection is to be used
  - Which fields, columns, layout, views, and functions are to be used

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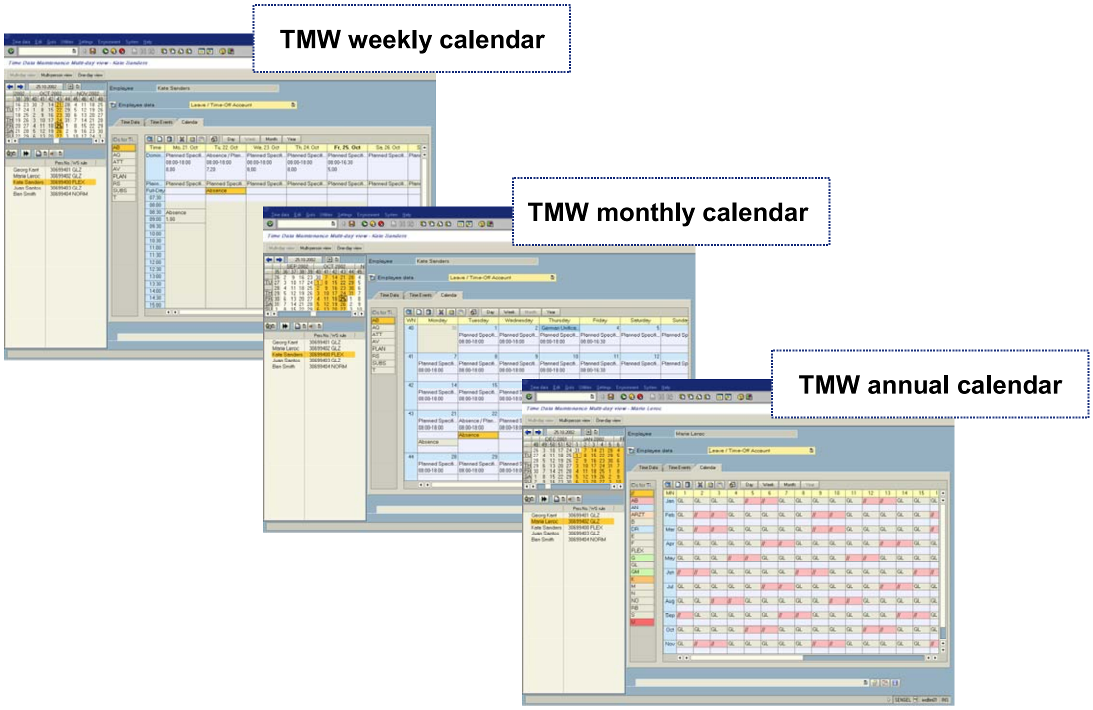
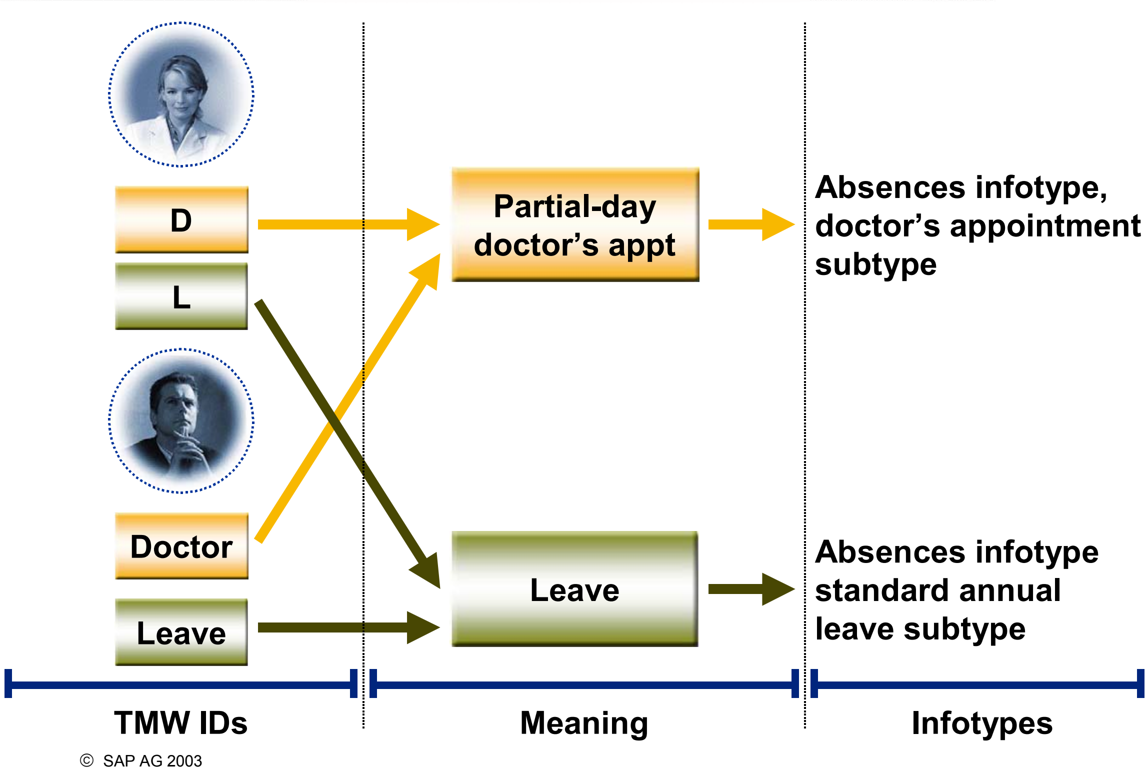
Calendar Views in the TMW

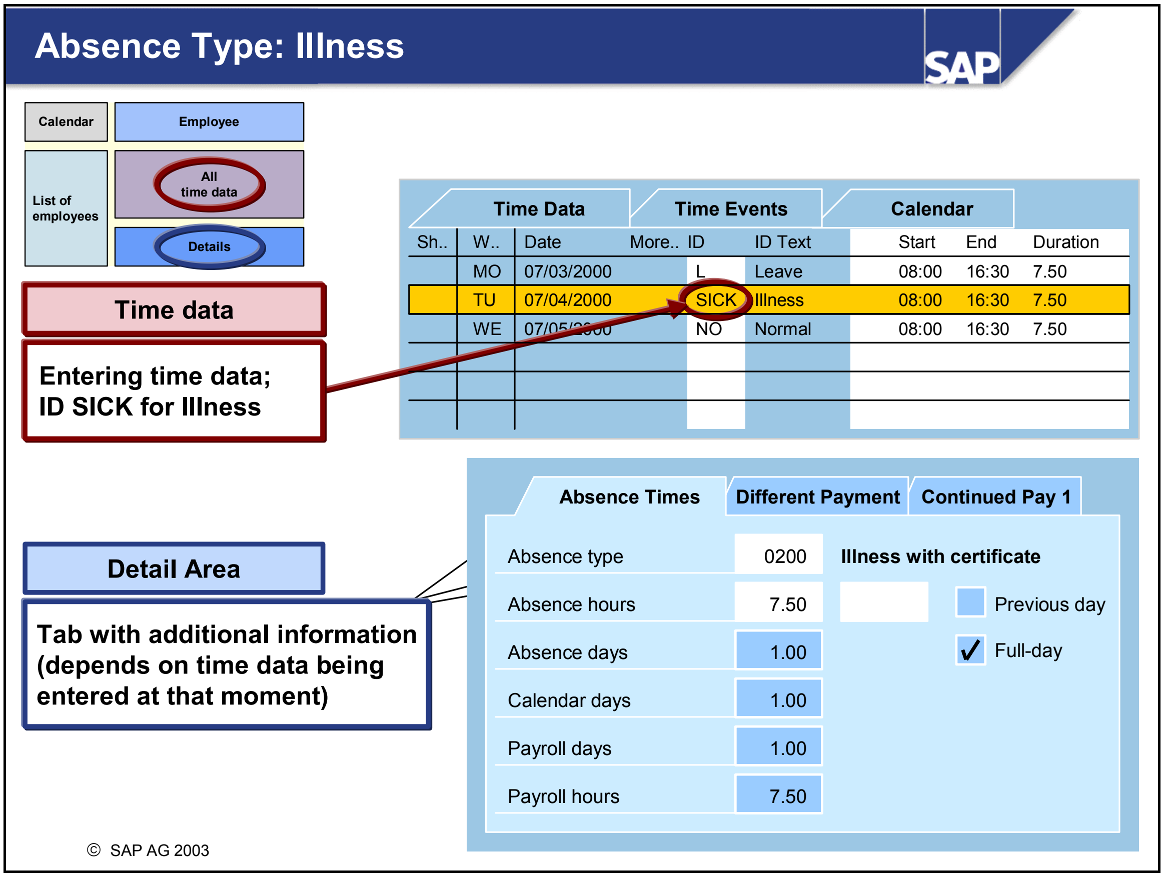


- The calendar view is new in the time data maintenance area of the TMW. It provides a graphical overview of a person's time data. A daily, weekly, monthly, and annual calendar are available, which enables you to gain a quick overview of a specific period. The use of colors for the time data IDs enables you to quickly differentiate different types of time data.
- You can also maintain data in this view. The color-coded time data IDs are displayed in a bar to the left of the calendar. You can drag and drop them to the required days. If required, you can copy and paste the calendar entries, such as recurring attendances or absences.
- Because they work in a similar way to well-known PC applications (such as Microsoft Outlook), the calendars are very easy to handle.
- The new calendar views are part of the standard delivery for R/3 Enterprise. hey can also be implemented in Release 4.6C on a project basis. (See SAP Note 421014 for details)

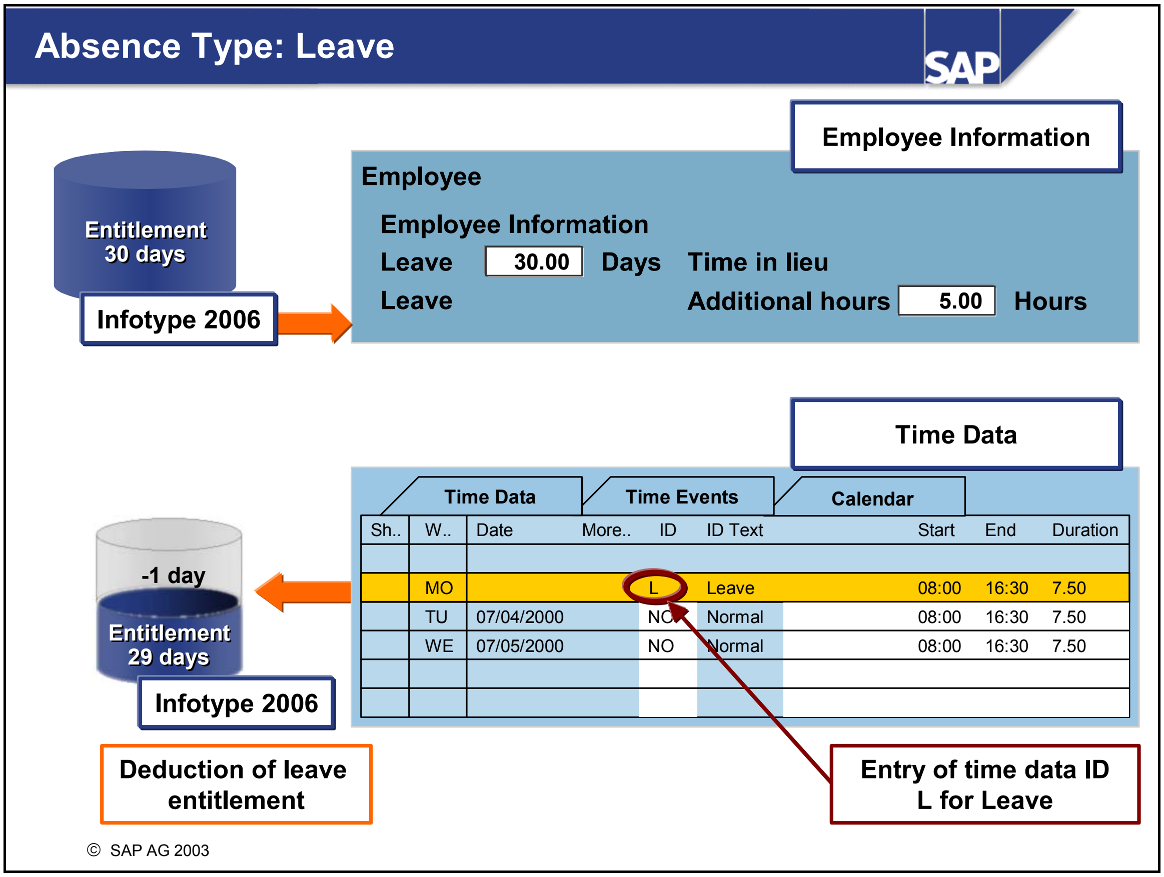
Personalized Time Data IDs



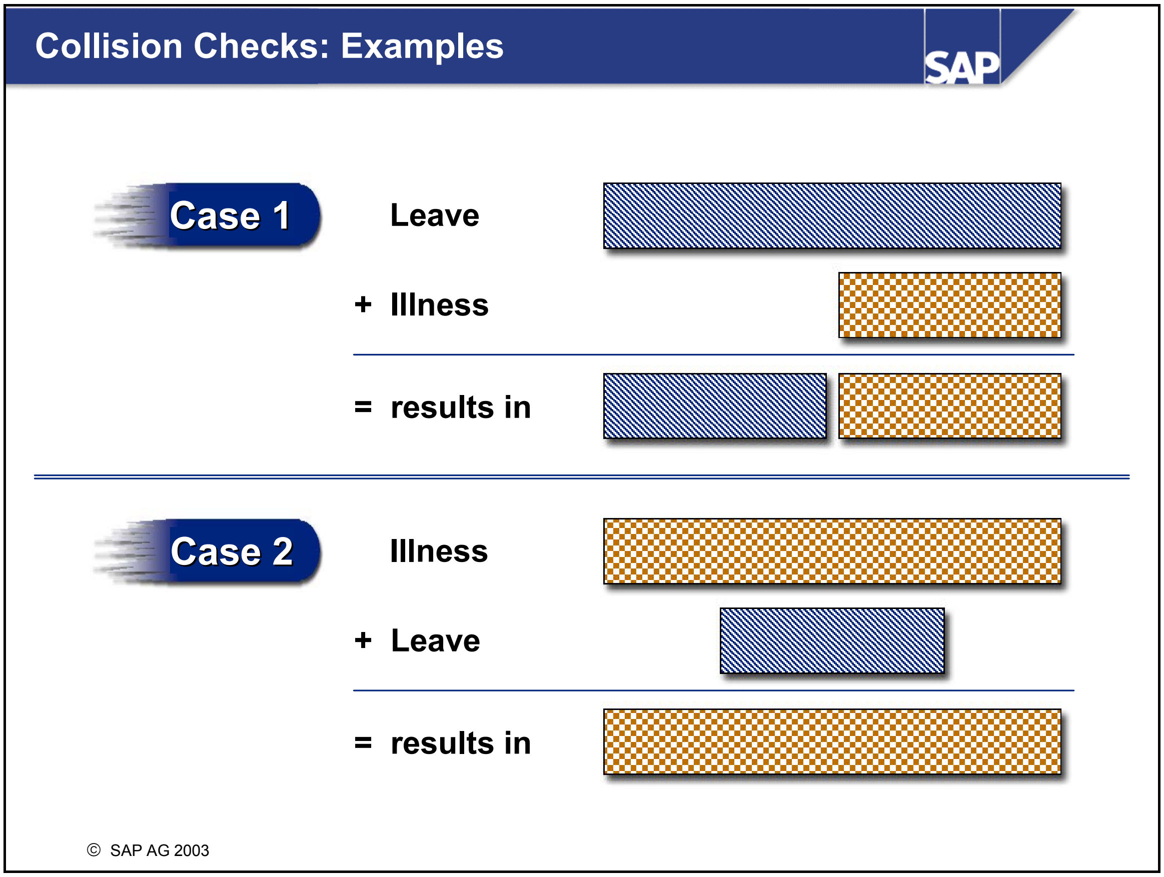
- The **Time Manager's Workplace** (TMW) is a user-friendly user interface for recording time data. Intuitive time data IDs are used to enter data. The time data itself is stored in the relevant time management infotypes.
- The IDs are defined for each type of time data in Customizing. For example, a time data ID such as "OT" can be defined for an absence type that is to be valuated using an overtime compensation type (such as *Time off plus overtime rate*) in time evaluation. The *Attendances* infotype (2002) and subtype for this attendance type are assigned to the time data ID in Customizing. The overtime compensation type is also defined for the time data ID.
- Time data entered in the TMW using time data IDs can also be processed in the ***Time Data Maintenance*** transaction and vice versa.
- Time data IDs can also be generic, that is, the corresponding subtype is not specified, for example. If time administrators use a generic ID for time data, they should specify its use in the ***Details*** area.



- You record and maintain the absence type *Illness* in the Time Manager's Workplace. This information is stored in the *Absences* infotype (2001) in the *Illness* subtype.
- Absence hours and absence days are calculated on the basis of an employee's personal work schedule.
- The calendar days are the number of days between the start and end date in the leave record, including non-working days.
- **Note:**
  Depending on the country-specific laws, you may require additional information on incapacity to work. You can enter this information in additional fields.



- As for other absences, the absence type *Leave* is also recorded in the Time Manager's Workplace; the data is stored as a subtype of the *Absences* infotype (2001).
- **Note:**
  You can save this absence type only if there is sufficient quota available. You can determine leave entitlement for all employees at once using the report **RPTQTA00 (Generating Absence Quotas).**



- When you record time data, data records frequently overlap one another. These overlaps are called collisions in the SAP System.
- When you enter a new time data record, the system checks whether other records have been entered for the employee for the same time period. Collision checks prevent data records that conflict with one another from co-existing in the system.
- When collisions occur, the system reacts by issuing a warning or error message, or by delimiting the old record.
- **Note**:
  You can define collisions for all time management infotypes in Customizing.

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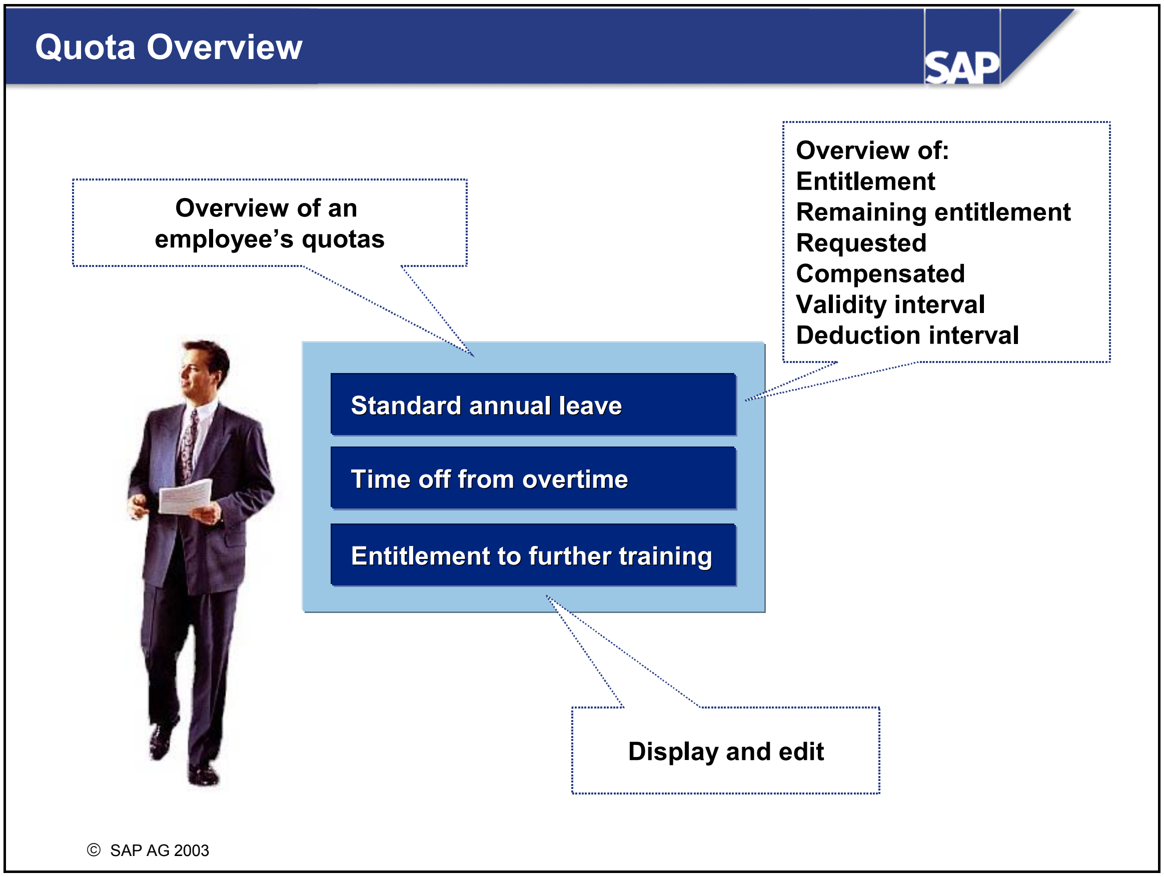

- An absence quota is an employee's time-limited entitlement to an absence. Similarly, an attendance quota is an employee's time-limited entitlement to an attendance.
- The quota overview provides:
  - A clear overview of an employee's current absence entitlements
  - Detailed information about automatically generated quota entitlements
  - The option of correcting quota entitlements manually
  - A simulated projection of future quota entitlements
  - The option of printing an overview of the projected quota entitlements

Time Management: Structure

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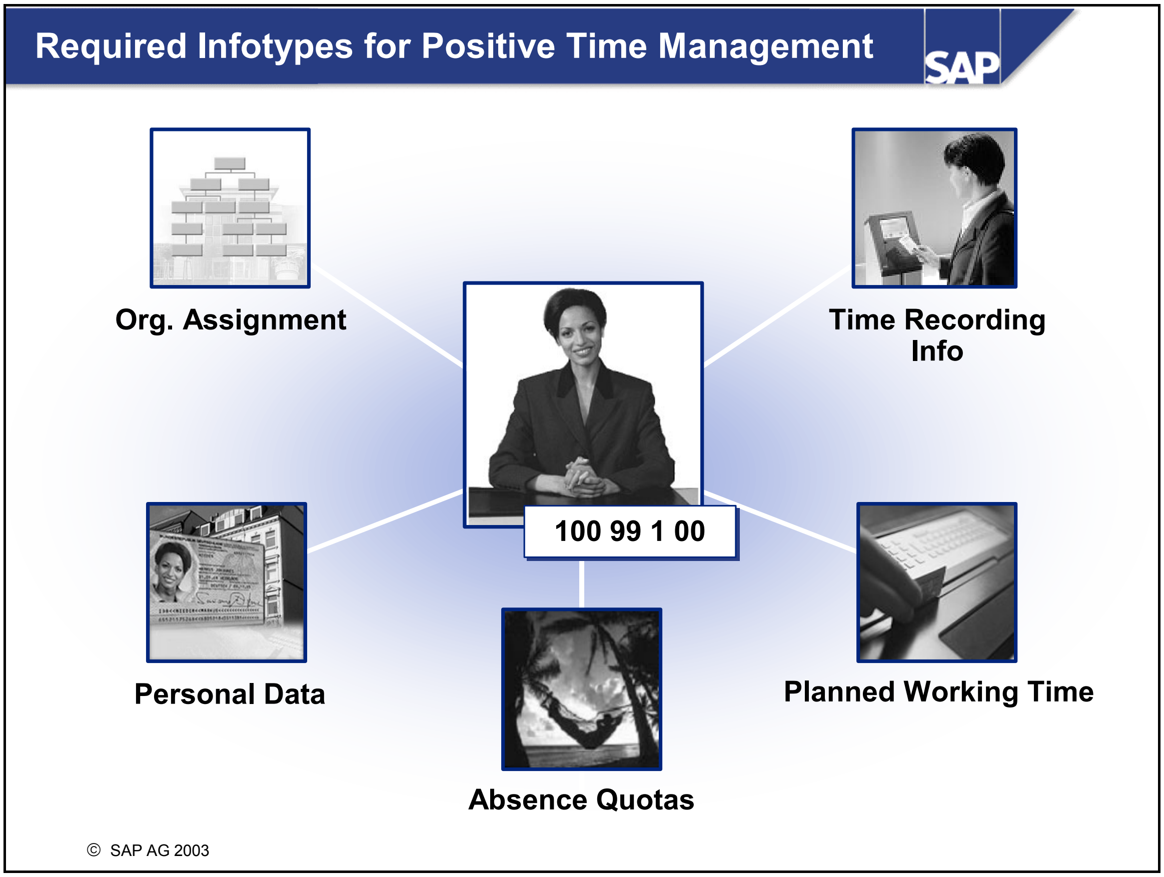
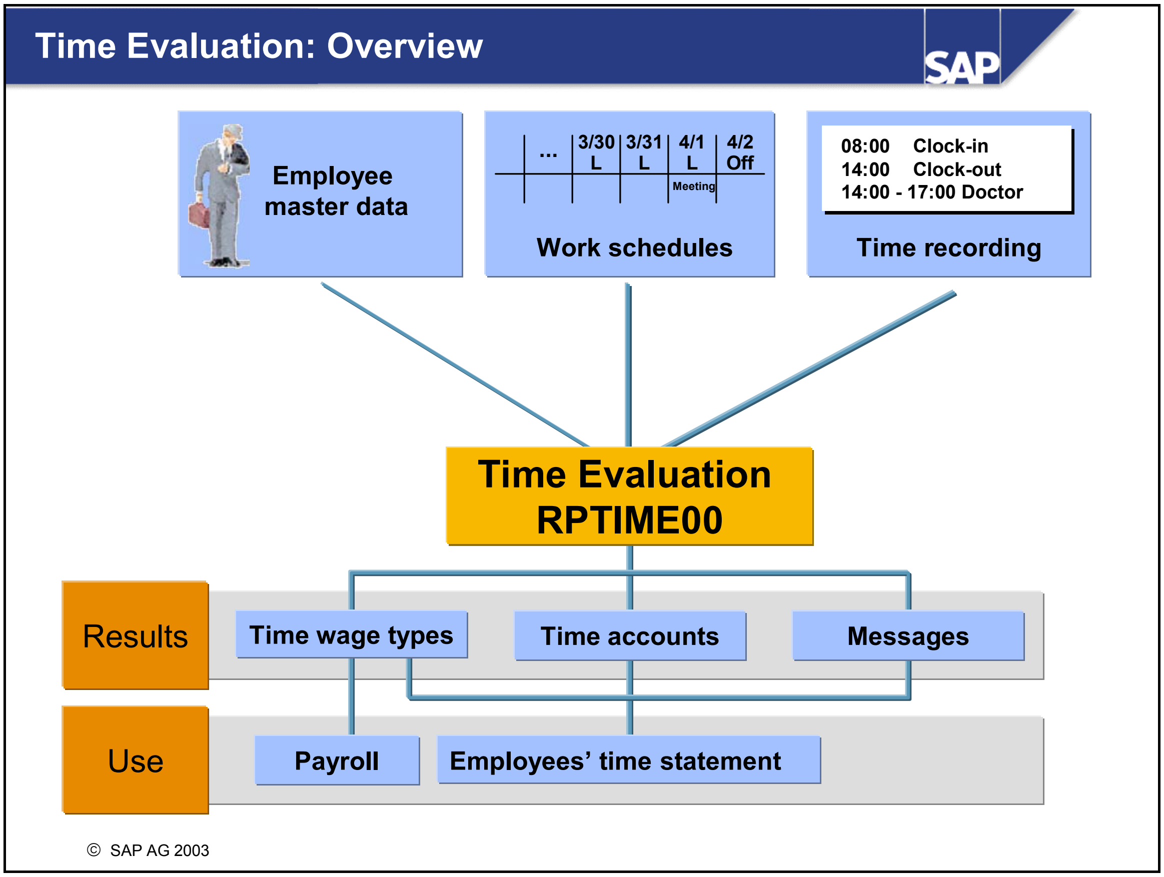
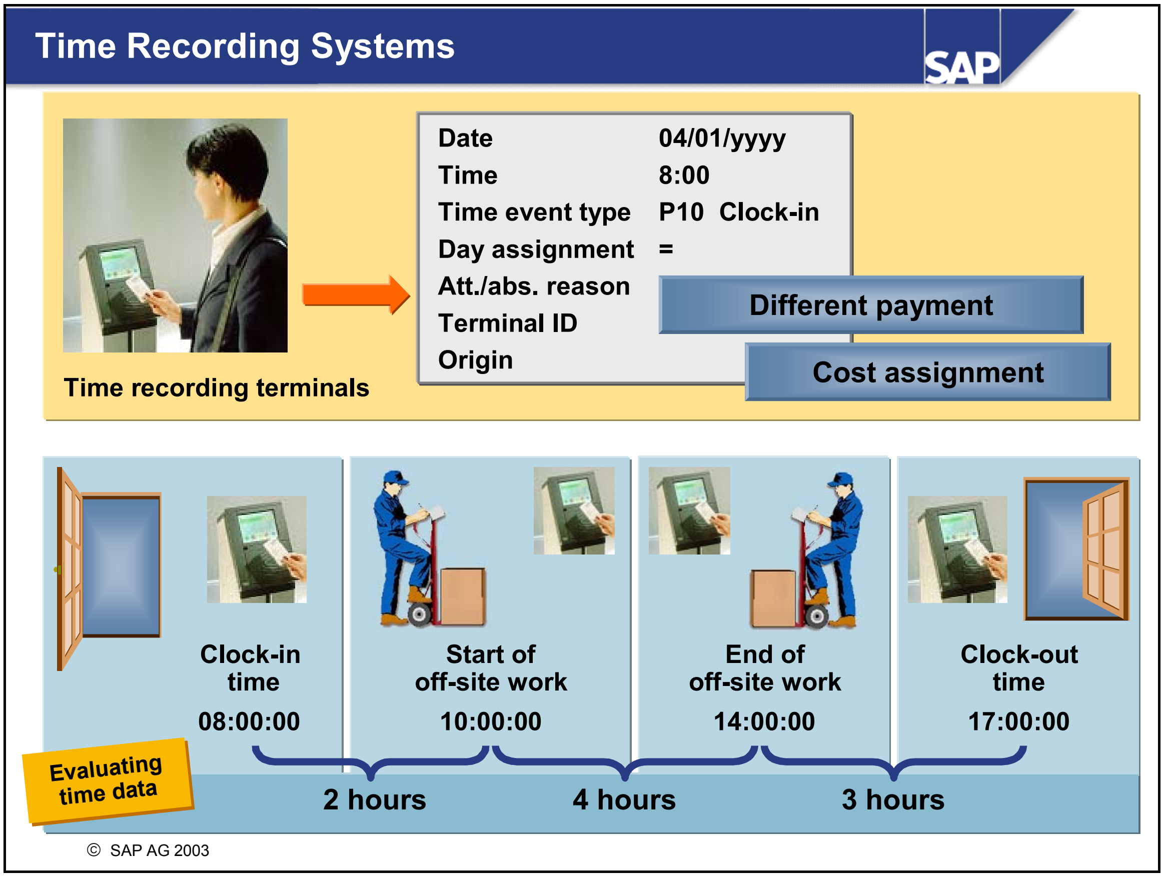


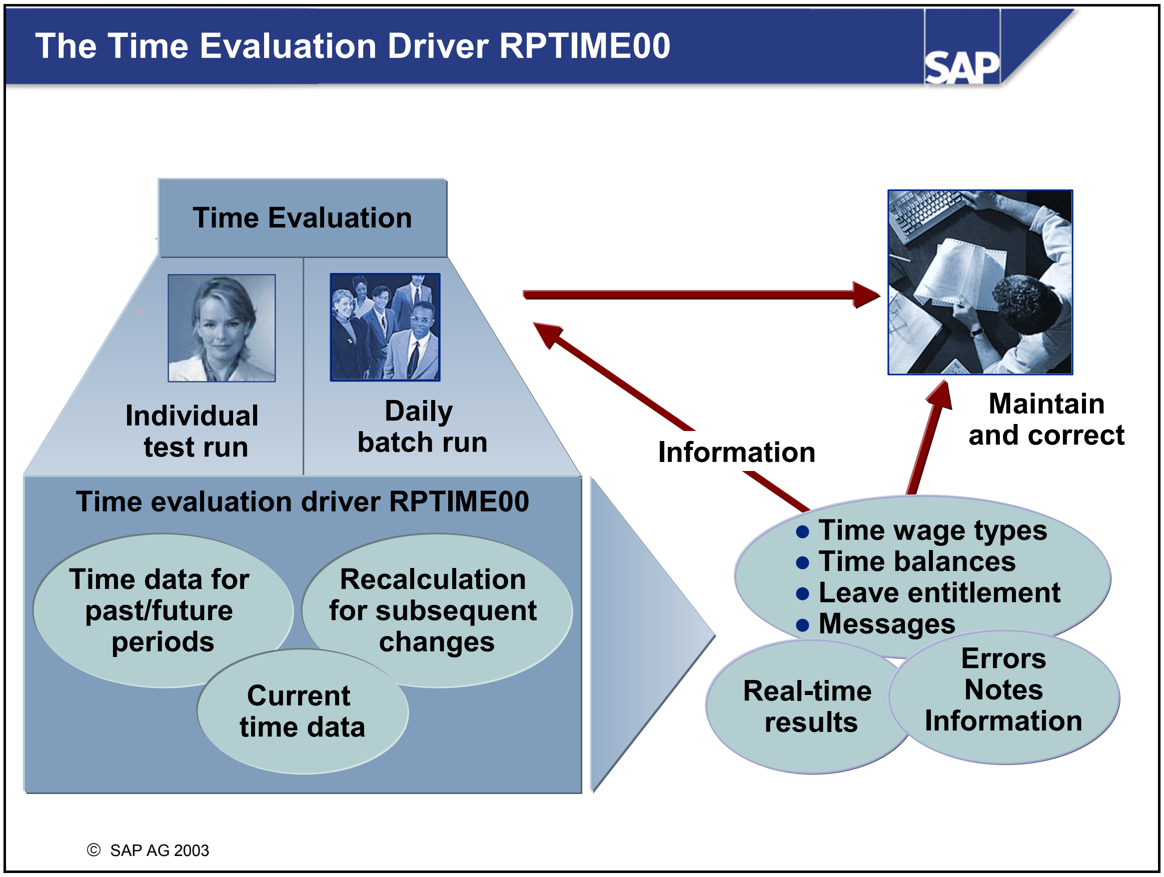
- In *SAP Time Management*, there are certain master data infotype records that you must create for every employee. Time management data is stored in the same master data records used by other HR areas, such as *Payroll* or *Personnel Planning and Development*.
- The following master data infotypes are required for *Time Management*:
  - *Organizational Assignment* (0001)
  - *Personal Data* (0002)
  - *Planned Working Time* (0007)
  - *Time Recording Info* (0050):
    This infotype is used in *Time Evaluation*. It can contain interface data on the subsystem and additional data on the employee that is relevant for time evaluation.
  - *Absence Quotas* (2006)



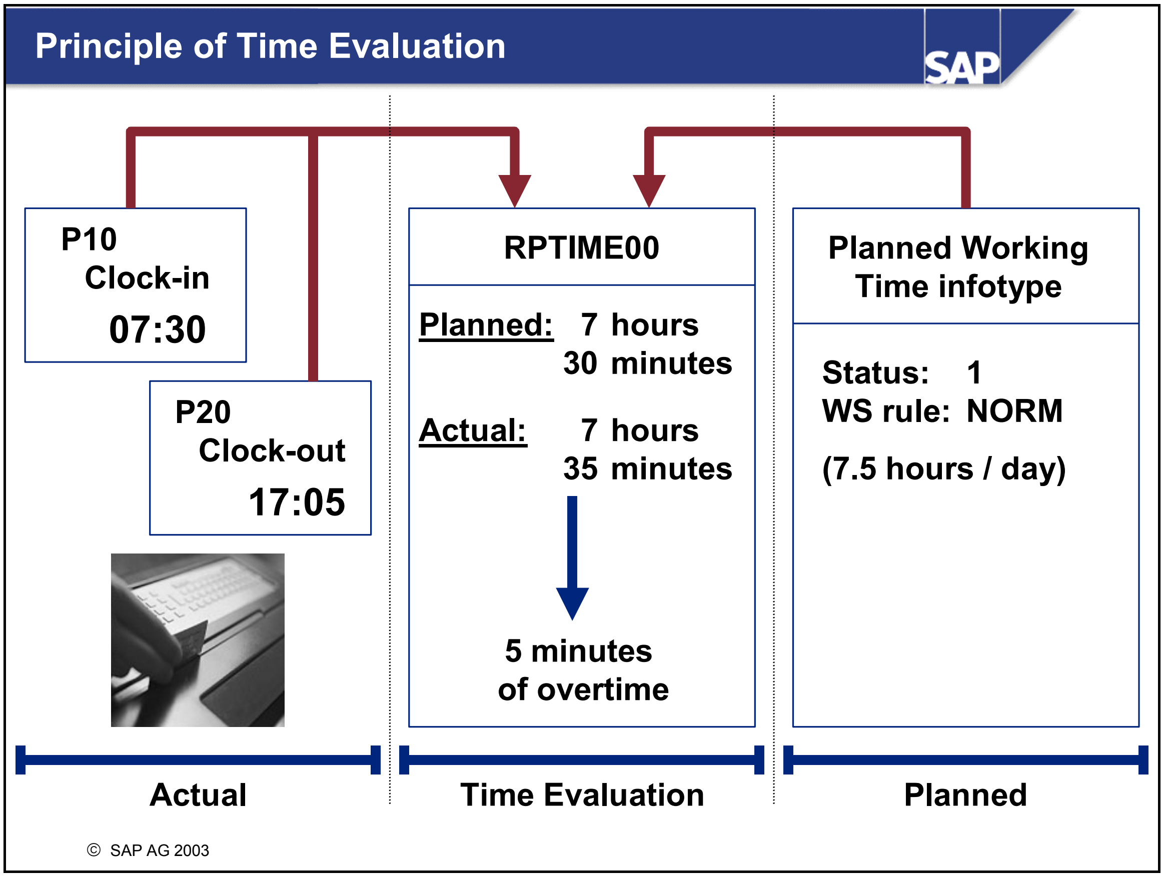
- In the SAP HR system, the term "time evaluation" is used to describe the evaluation of employees' attendances and absences using a report..
- Front-end time recording systems are often used to record actual data. Employees use these systems to record their start and end times (actual working times) electronically using a time recording ID card. The data is then uploaded to the HR system, where it is processed in Time Evaluation. The system then compares the employees' actual times with those specified in the period work schedules assigned to the employees, and valuates the data.
- However, use of time recording terminals is not necessary for working with time evaluation. You can also record employees' working times manually using the *Attendances* infotype (2002). It is also possible to perform time evaluation without having recorded employees' actual times.



- The most common way for employees to enter their own working times is by using time recording systems. Using time recording systems considerably lessens the burden on HR departments and time administrators.
- Time recording systems enable you to record attendance times automatically.
- Employees post at the time recording system when they:
  - Arrive at work
  - Have a break
  - Work off-site
  - Leave work
- Time administrators can display, and if necessary change, the recorded time data or maintain it using the Time Manager's Workplace or the *Time Events* infotype (2011).
- The infotype contains information such as the origin of the record (whether it was recorded manually or at a subsystem) and the terminal ID.



- Time evaluation is performed by the time evaluation driver RPTIME00. It evaluates employees' time data that has been recorded either at the time recording terminals or in the time management infotypes.
- Time evaluation generally runs once daily, overnight, and is started using a batch job. It is normally used for large groups of employees.
  You can also run time evaluation for individual employees or groups of employees, or for particular past evaluation periods. This function is particularly useful for test purposes, for example.
- The time evaluation report can also be run for future periods. A future evaluation can be useful in the following situations:
  - You want time evaluation to determine an employee's anticipated absence entitlements when absence quotas are built up automatically.
  - You want to evaluate planned times in shift planning while taking anticipated overtime into account.



- The time evaluation driver RPTIME00 compares the recorded actual times (in this case, time events P10 and P20) with the planned specifications from the *Planned Working Time* infotype (0007).
- In the example shown above, this results in overtime of 5 minutes.

Using the Data Determined

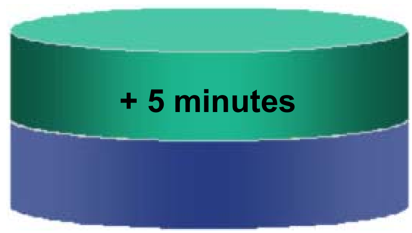
5 minutes of overtime determined by RPTIME00

1. Deduct from quota

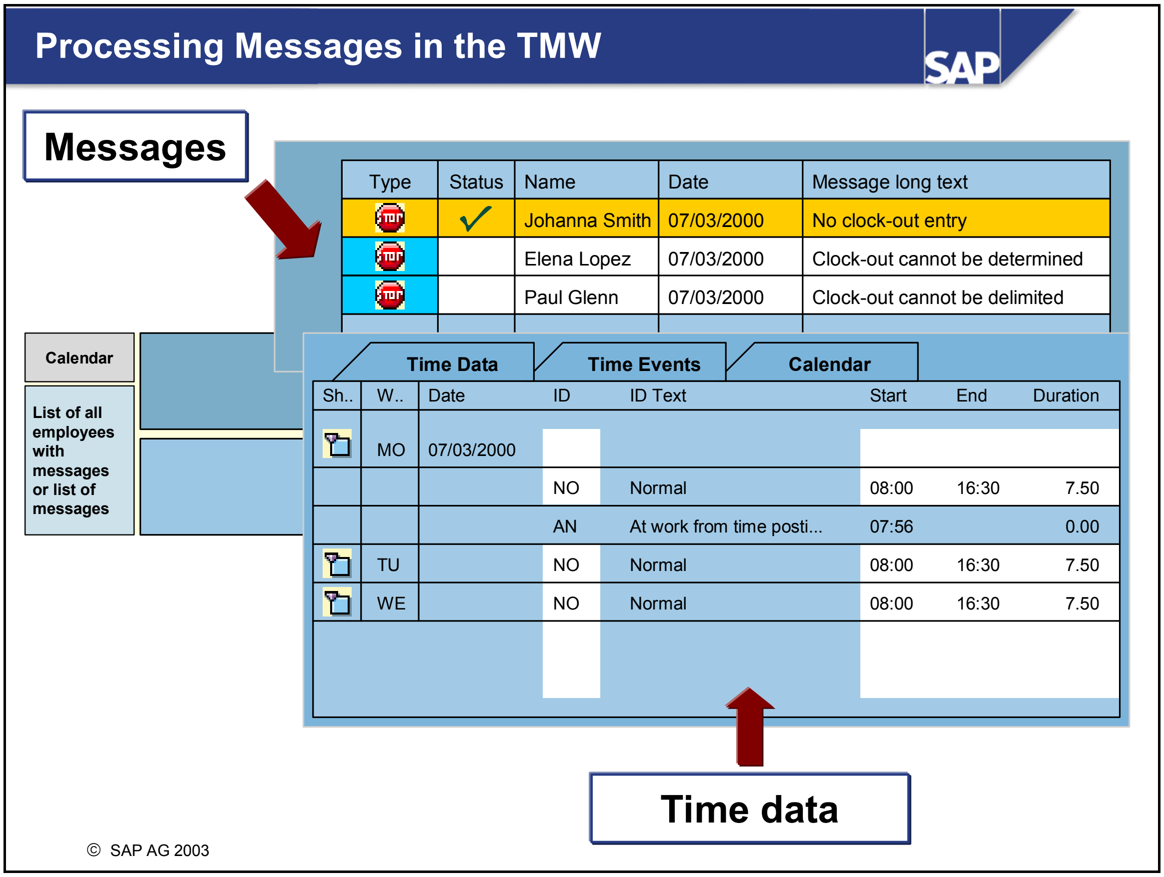
→ **Infotype: Attendance Quotas**
Subtype: Approved overtime

2. Post overtime

→ **Time off from overtime account**



- The overtime determined by the time evaluation driver has to be processed accordingly in the system.
- The system must first decide whether the overtime is approved. In the example displayed above, there is an attendance quota from which it can be deducted.
- The overtime is then posted to a time account, in this case the employee's time off from overtime account.



- An improved message processing function is integrated in the Time Manager's Workplace. The same interface used for maintaining time data is also used for processing time evaluation messages.
- Various messages can be displayed, for example:
  - Errors that cause time evaluation to terminate, for example, missing time postings
  - Errors that do not cause time evaluation to terminate but set the recalculation date to the day with errors, for example, if the working time was not finished when time evaluation was run.
  - Information relating to situations of note, for example, core time violations.
  - Notes (not highlighted) do not require postprocessing, for example, core time violations.

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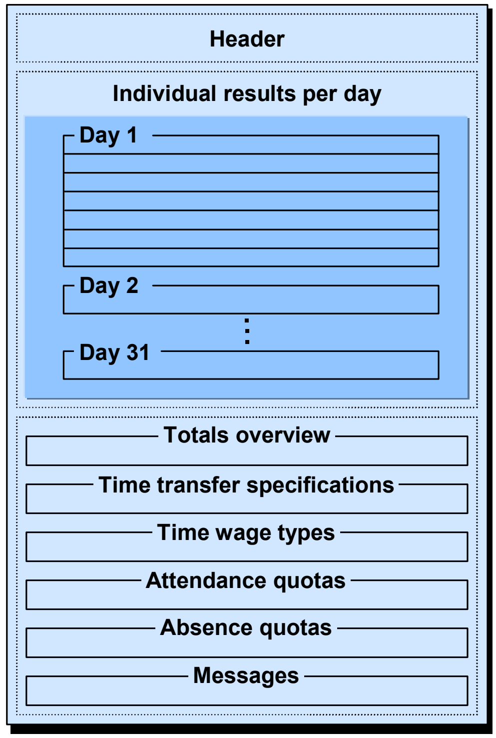
Form Layout



- You can use the time statement to create an employee-related overview of the time evaluation results.
- You can also use the time statement to inform employees of their current balances, time credits, daily attendance times, and so on.
- You can provide employees with this information in a printed form, or using the Internet/intranet application.
- You use the Form Editor as a tool to adapt the requirements of company-specific time accounts.

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- Part E: Cross-Application Time Sheet (CATS)

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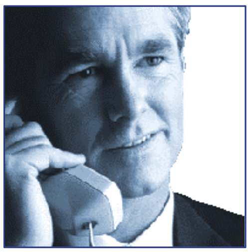
Shift Planning: Overview

By using the *Shift Planning* component, you can distribute the human resources of your enterprise appropriately and efficiently. It helps you to assign shift times, shift location, personnel selection, and number of required employees to one another so that optimal personnel capacity is achieved.



Requirement:

Two English-speaking consultants on weekdays between 2:00 p.m. and 6:00 p.m.

- *Shift Planning* is a component of *R/3 Time Management*. The continuous transfer of data between *Time Management*, *Organizational Management*, *Human Resources*, and *Personnel Development* ensures that data is always kept up to date throughout the system. For example, any changes to data made in *Time Data Recording and Administration* or *Time Evaluation* that affect shift planning, or any changes to data made in *Shift Planning* that affect payroll are incorporated in all of the components. In this way, planning errors, such as those that can occur when manually transferring data, are minimized.

Shifts

Existing data from Time Management

Daily work schedules, attendances and absences, availability

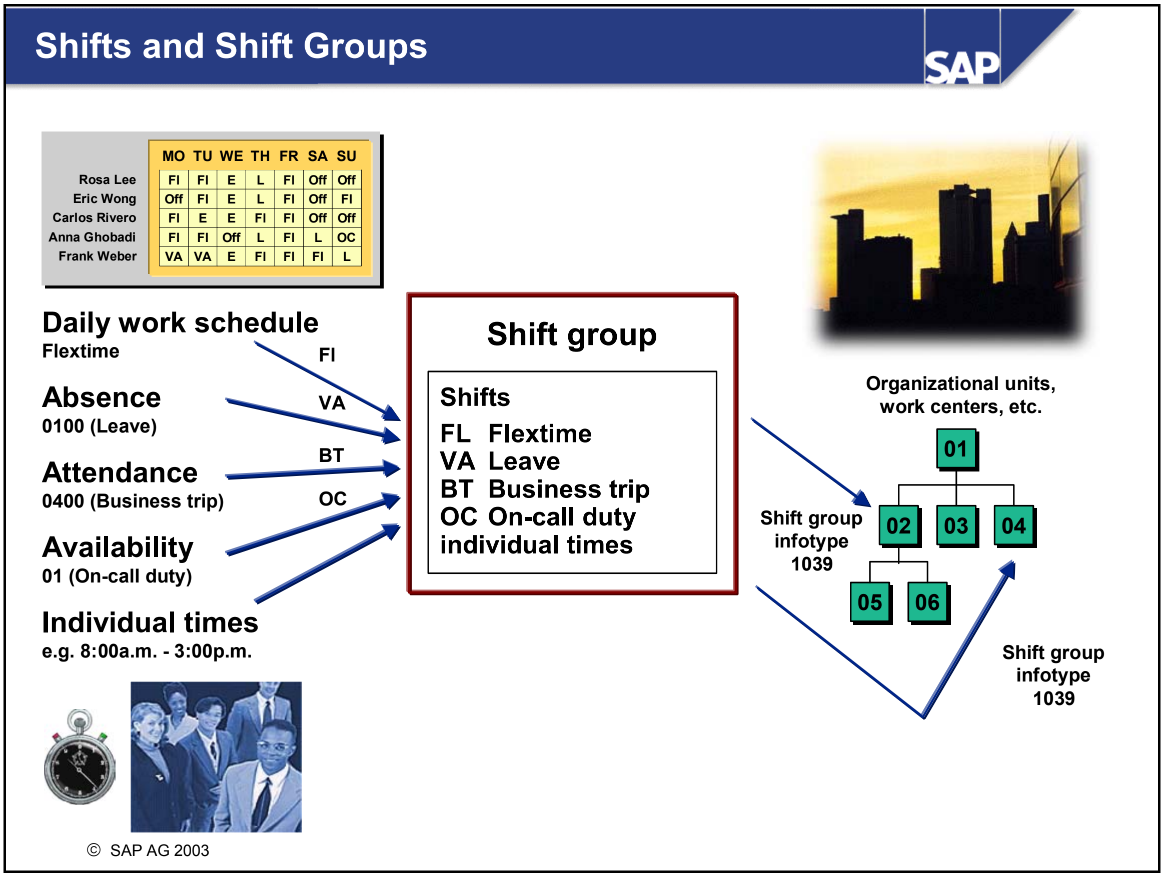
Assignment to shift abbreviations

Daily work schedule "Early shift" → Abbreviation ES
Absence type "Leave" → Abbreviation L

Use in Shift Planning

Use of shift abbreviations in Shift Planning

- All time management data is represented in the shift plan in the form of shift abbreviations. Changes made to the shift plan are then transferred to *Time Management*.
- A shift describes a period of working time with an identifying shift abbreviation and a corresponding name.
- You can define shifts that contain their own periods of working time. You can also assign daily work schedules to the shifts which are available as a result of the integration of all *Time Management* components.



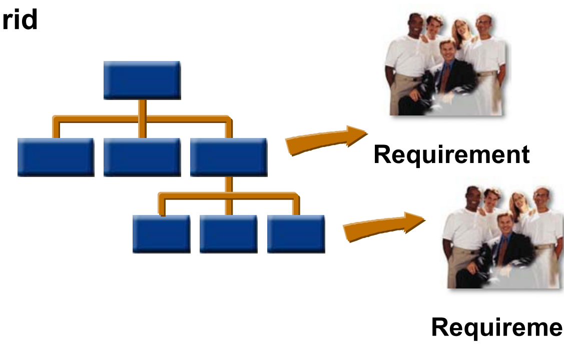
- Data from the personal work schedule is used as the basis for shift planning, as well as the shift group of each organizational unit.
- Shifts can be grouped together into shift groups. Shift groups can then be assigned to entry objects, such as a department (organizational unit) or a work center. When you plan shifts, the shifts that are assigned to the current entry object via the shift group are activated.

Requirements Definition

Requirements can be defined for the various day types (workdays public holidays, weekends, and so on) for individual organizational units or work centers.

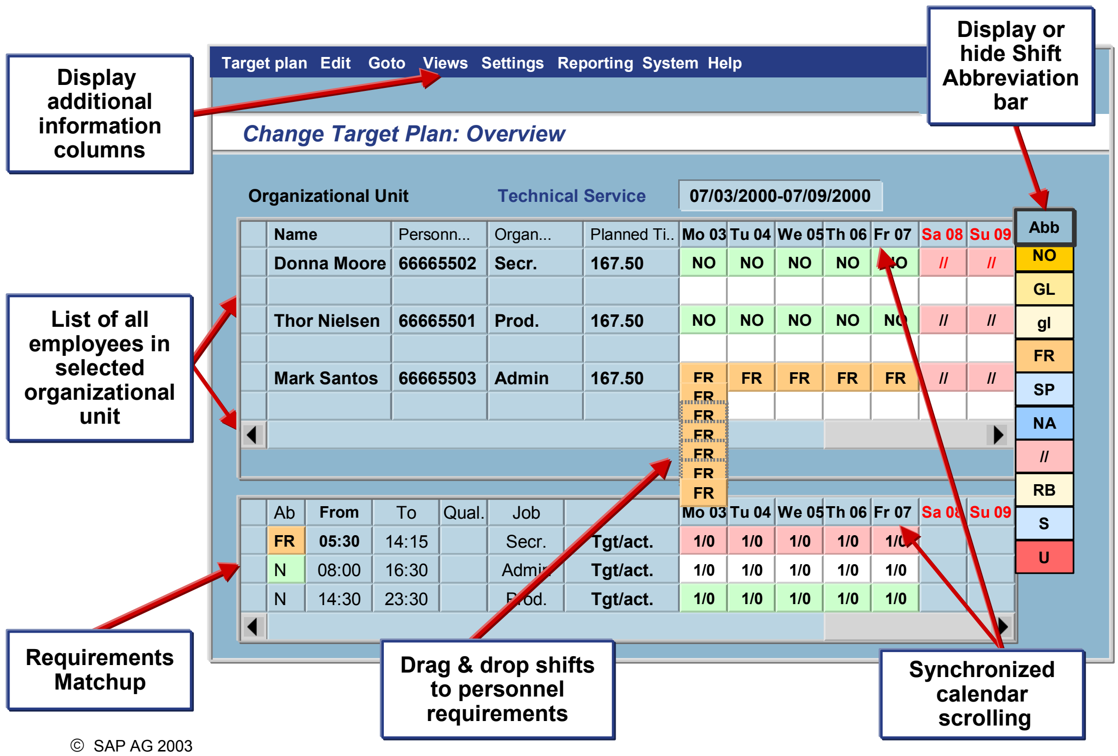
Requirements can include:

- **Time information** – **Shift abbreviation**, **Time interval**, **Grid**
- **Number of employees**
- **Jobs**
- **Additional qualifications**



- The following elements can be specified in a requirements record:
  - **Shift (daily work schedule)** or **individual time interval**
  - **Number:** You determine the number of employees that need to be scheduled to cover a requirement. You can also enter a minimum or maximum number of employees and thus specify how many employees are required to optimally cover the requirements.
  - **Job**
  - **Qualifications:** You specify which qualifications are required of the employees you want to schedule to cover a requirement. Examples of qualifications are foreign language abilities or special machine-related or technical skills.
  - **Comments** Individual names, brief descriptions or notes on the requirement or employees
  - **Validity interval:** You specify the period in which the requirement is valid.

Changing the Shift Plan



- The color layout gives you an overview of the availabilities and requirements within a planning period.
- The screen that appears when you call up the target plan displays a calendar in which a list of selected employees is displayed, along with their personal work schedules.
- You can copy the target plan of one employee to another employee.
- The shift plan also indicates whether an employee is “locked” for processing by another user in the system. When this employee is “unlocked,” he or she can be immediately locked again for scheduling in a shift plan.
- You can use the drag & drop function to assign shifts to personnel requirements.
- Synchronized scrolling through both subscreens ensures calendar columns are displayed directly above each other at all times.
- There is automatic matchup and assignment to personnel requirements, if shifts or working times are changed.

Edit Target Plan: Day View

Edit Target Plan: Day View

Shift Plan for Monday, 03/07/2000

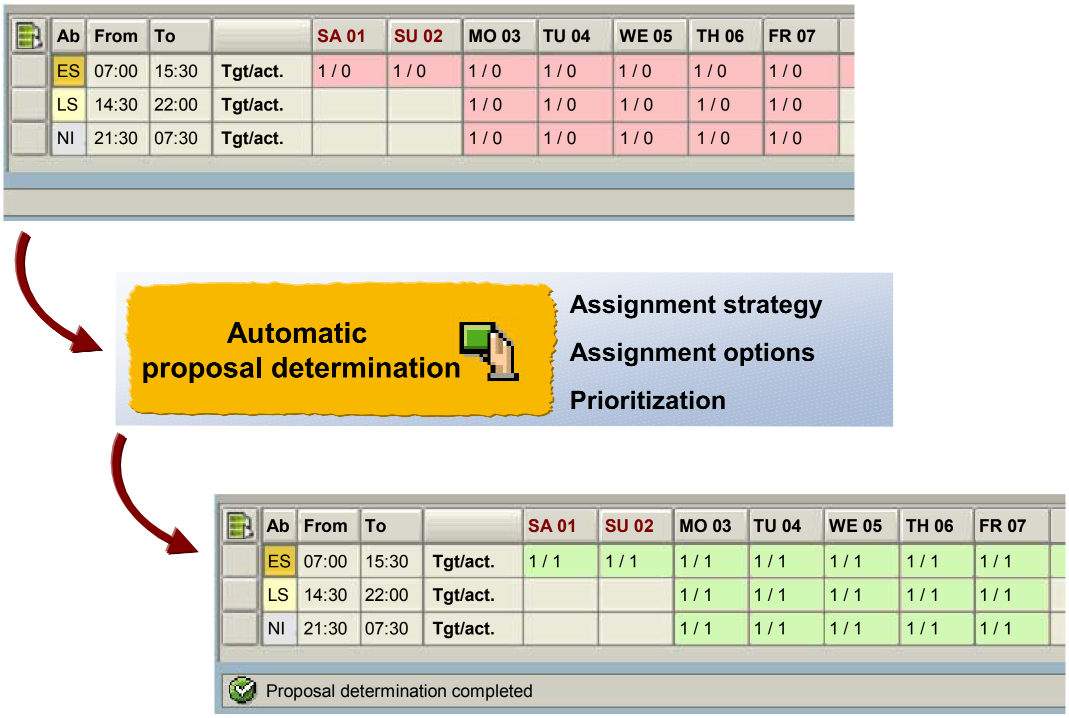
	Name	Info	Ab	Shift	From	To	08:00	09:00	10:00	11:00	12:00	13:00
▶	Donna Moore		NO		08:00	16:30	I------	-------	-------	-------	-------	-------
▶	Thor Nielson		NO		08:00	16:30	I------	-------	-------	-------	-------	-------
	Mark Santos		ES		05:30	14:15	I------	-------	-------	-------	-------	-------

Requirements

	Ab	Shift	From	To	Job	Tgt	ID	Matchup	Qual.	Comments
	ES		05:30	14:15	Secretary	1		x		EE should...
	NO		08:00	16:30	Admin	1		x		

- In addition to the calendar view, there is a day view available for assigning requirements and employees, especially for partial-day shifts and working times. By using the day view, you can easily schedule requirements that last whole days or just partial days, as well as schedule any specific day individually in the shift plan. Furthermore, you can display and edit partial-day absences and attendances.

Automatic Proposal Determination



	Ab	From	To		SA 01	SU 02	MO 03	TU 04	WE 05	TH 06	FR 07
	ES	07:00	15:30	Tgt/act.	1 / 0	1 / 0	1 / 0	1 / 0	1 / 0	1 / 0	1 / 0
	LS	14:30	22:00	Tgt/act.			1 / 0	1 / 0	1 / 0	1 / 0	1 / 0
	NI	21:30	07:30	Tgt/act.			1 / 0	1 / 0	1 / 0	1 / 0	1 / 0

	Ab	From	To		SA 01	SU 02	MO 03	TU 04	WE 05	TH 06	FR 07
	ES	07:00	15:30	Tgt/act.	1 / 1	1 / 1	1 / 1	1 / 1	1 / 1	1 / 1	1 / 1
	LS	14:30	22:00	Tgt/act.			1 / 1	1 / 1	1 / 1	1 / 1	1 / 1
	NI	21:30	07:30	Tgt/act.			1 / 1	1 / 1	1 / 1	1 / 1	1 / 1

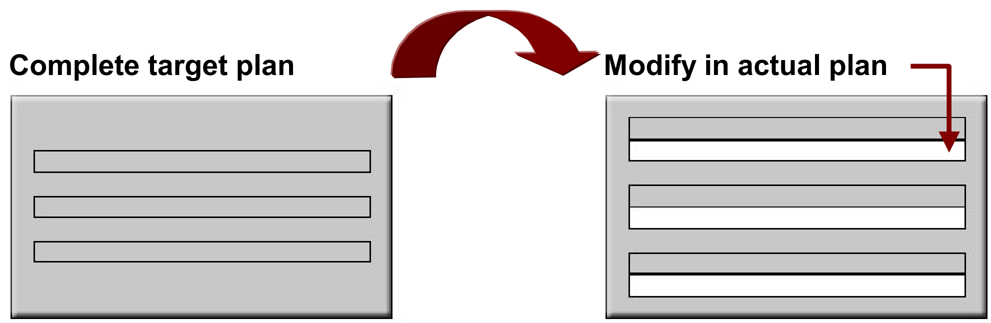
Proposal determination completed

- You can use assignment options to specify which changes can be made to working times or requirement times in automatic proposal determination in order to assign an employee to a requirement.
- By setting priorities for suitability criteria, you specify how the system selects employees for automatic proposal determination.
- Automatic proposal determination is based on an assignment strategy, in which you define the criteria (working time, requirement interval, employee selection) to be used to assign employees to personnel requirements.
- You can either use the standard SAP strategy, or define your own, user-specific, strategy in Customizing. You can also define one of the various strategies as a default strategy.

Completing Target Plan and Editing Actual Plan

You can edit and save the **target plan** as often as you like. When you save the target plan, only the most current version is saved, and this data is transferred to *Time Management*. You complete the target plan when no further changes to the plan are necessary and you want to archive it.

Modify the actual shifts that are worked in corresponding fields in the **actual plan** that contain the target shifts.



- The shifts entered in the target plan are transferred to the actual plan. If a different shift is entered in the actual plan, the system creates a substitution record in *Time Management*. The system overwrites the already existing substitutions in the shift plan when new substitutions are created.
- The target plan is then stored for reference purposes.
- In shift planning, you can use *Time Evaluation* to compare target and actual plans.
- You can also export the actual and target plans to Microsoft Excel for further editing.
- **Note:**
  You can use a report to reset a completed target plan to incomplete.

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Time Management: Structure

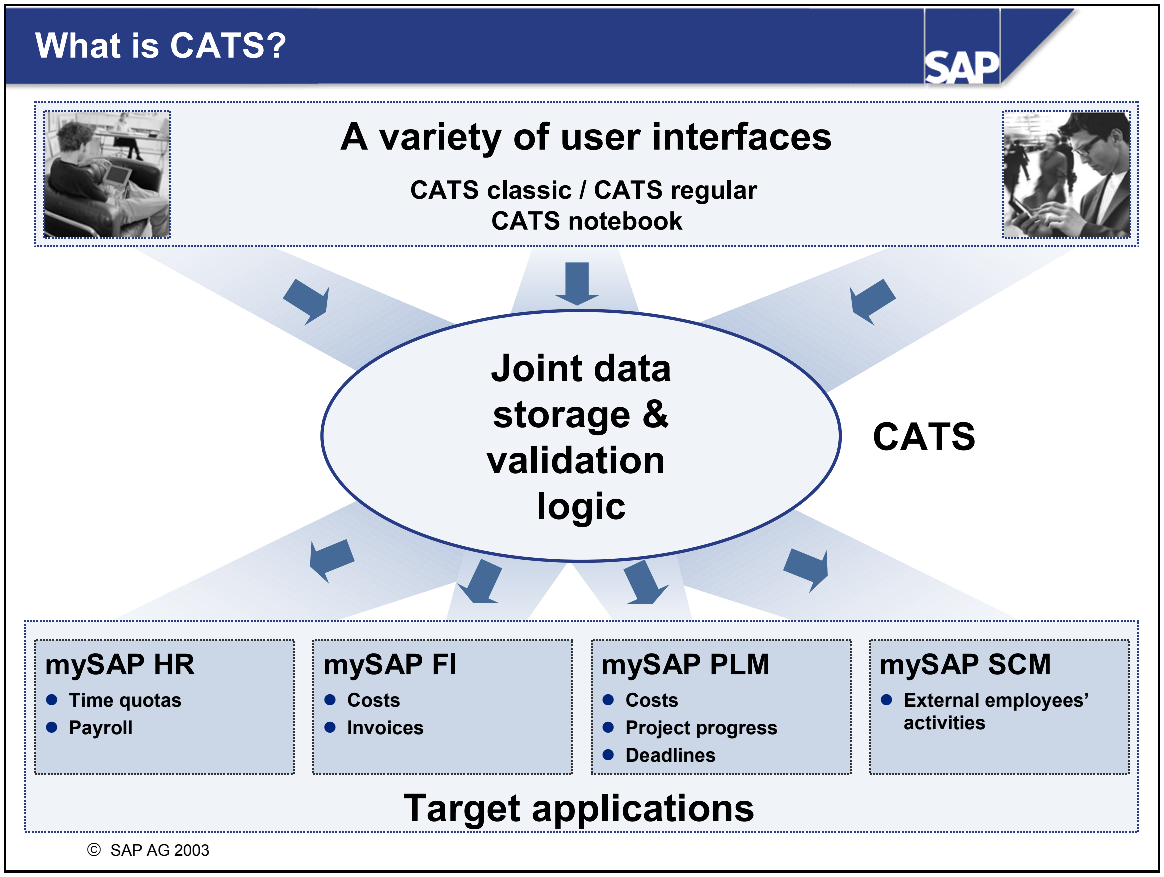
Part A: Basics of Time Management

Part B: Entering Time Data

Part C: Evaluating Time Data

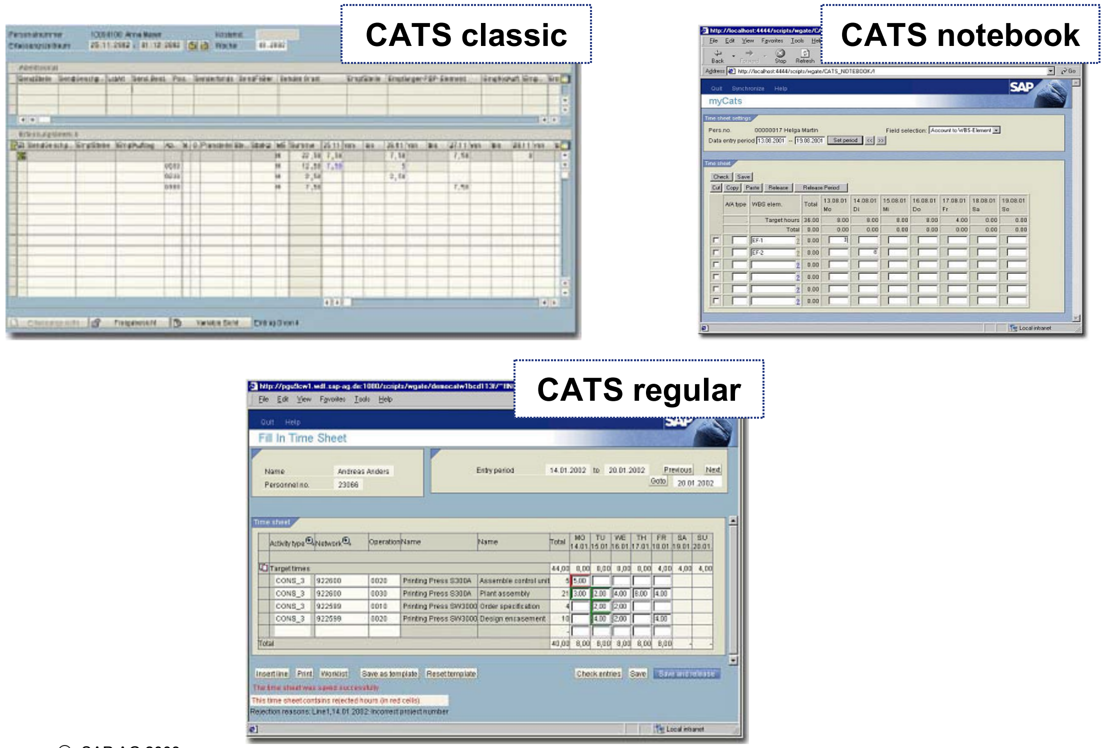
Part D: Shift Planning

Part E: Cross-Application Time Sheet (CATS)



- The *Cross-Application Time Sheet* (CATS) is another form of Employee Self-Service. You can use it to record the actual working times of individual employees.
- The *Cross-Application Time Sheet* offers the following advantages:
  - Cross-application standard screens for entering working times
  - Ease of use for all users
  - Default values and data entry templates
  - Integrated approval process
  - Support for corrections
  - SAP enhancements for increased flexibility in the definition of authorization checks, plausibility checks, and default values.

Standalone User Interfaces



- **CATS classic** is the original user interface of the Cross-Application Time Sheet in the SAP R/3 System. It is particularly suited to users who also use the SAP R/3 System to complete other tasks. *CATS classic* is the most suitable user interface for entering working times for multiple personnel numbers, for example, by secretaries.
- **CATS regular** offers a similar data entry screen and comparable functions to *CATS classic*. However, this user interface has been optimized for use as an Employee Self-Service (ESS) application in a Web browser.
- The data entry screen for **CATS notebook** is similar to that of *CATS classic* and *CATS regular*. *CATS notebook* also runs in the Web browser. *CATS notebook* is designed for use with notebooks, and is particularly suited to employees who have to travel a lot and cannot always have a connection to the SAP R/3 system to record their working times. *CATS notebook* saves the working times entered in its own data store on the notebook. The next time *CATS notebook* is connected to SAP R/3, it synchronizes this data store with the CATS database in SAP R/3. The synchronization ensures that you can change working times both in CATS notebook and in SAP R/3 and that the most important working time attributes are available in the input help on the notebook.

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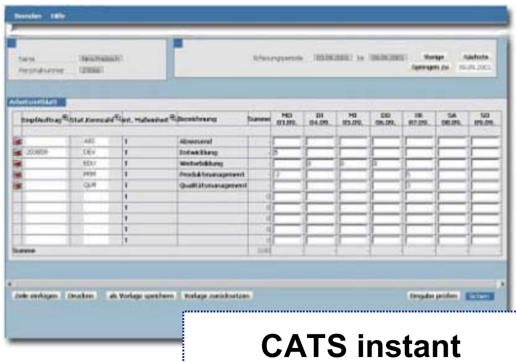
Additional User Interfaces



CATS instant
(as iView in portal)

+ modem

CATS phone
(on WAP-enabled devices)

- **CATS instant** is an iView and runs in an enterprise portal. It enables you to enter your current tasks or working times as you go along. *CATS instant* is aimed primarily at users who have to record billable tasks. Such users may need to record the time they have spent on individual tasks accurately and at several times during the day. This iView enables users to record their working times quickly and easily. A worklist, from which users can choose the most important account assignment objects, is available for entering tasks.
- **CATS phone** is a WAP application and runs on WAP-enabled cell phones. Similarly to *CATS instant*, it is aimed primarily at users who have to record billable tasks. In addition, it is primarily aimed at employees who have to travel a lot and visit several customers each day. *CATS phone* enables these employees to enter their tasks quickly as they go along. A worklist, from which users can choose the most important account assignment objects, is available for entering tasks.

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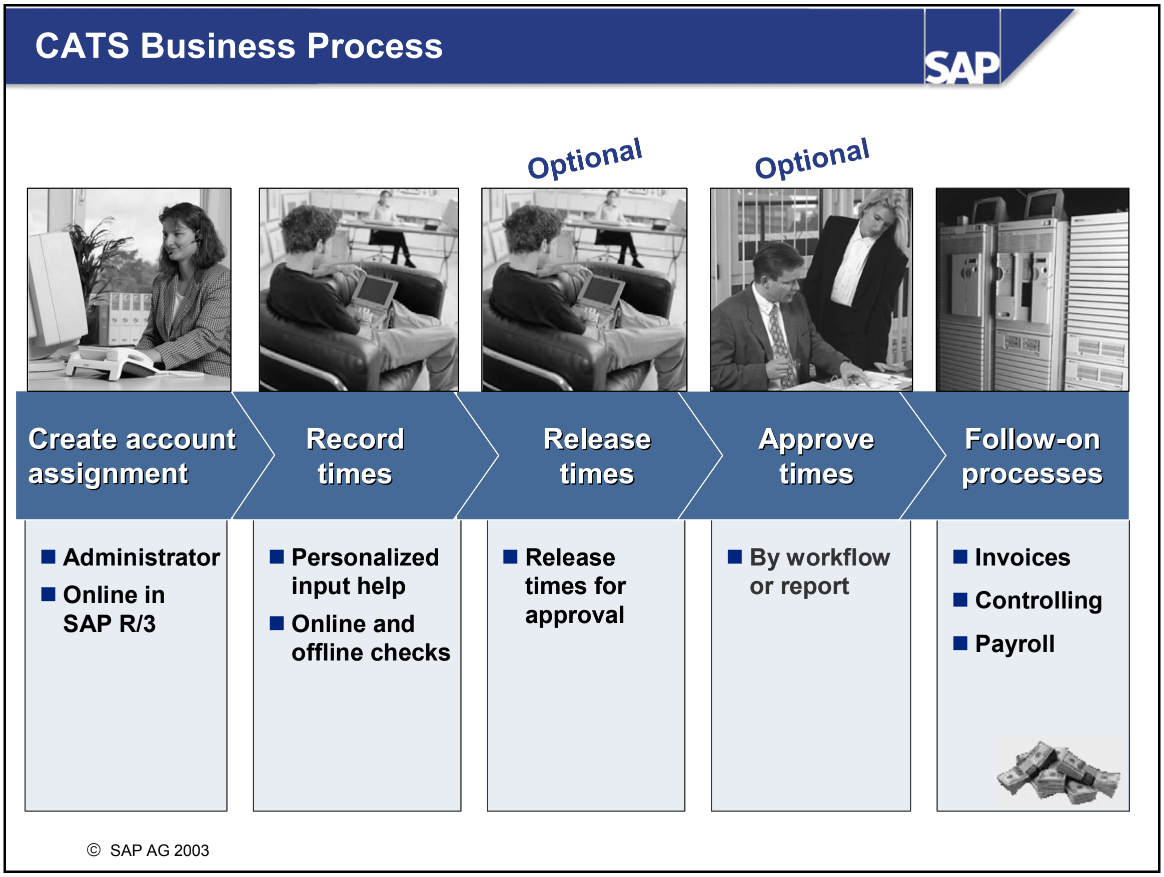
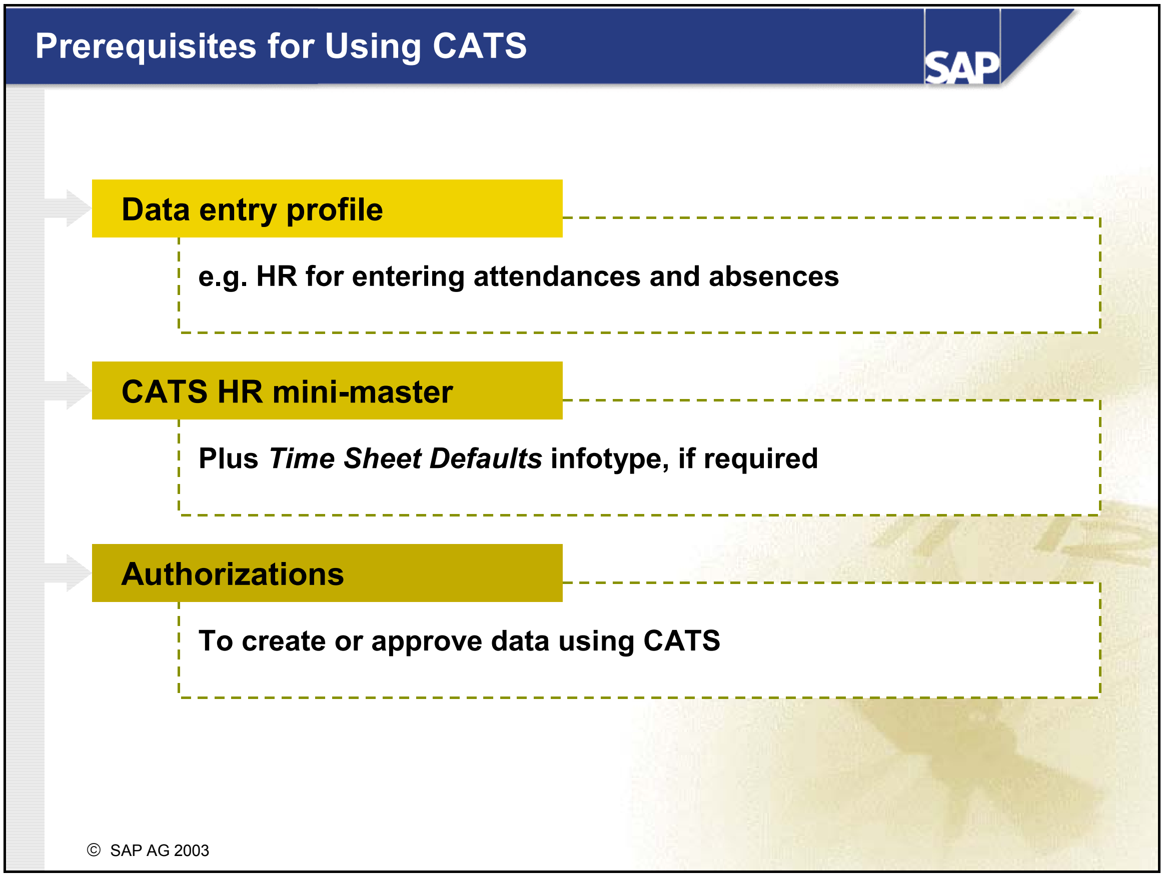


- The process in the *Cross-Application Time Sheet* consists of the following steps:
  - Entry of time data in the time sheet
  - Release of time data
  - Approval of time data (also using a Workflow)
  - Transfer of time data to the target application
- **Note**:
  The "release time data" and "approve time data" steps are optional.



- The prerequisites for working with the *Cross-Application Time Sheet* are:
  - Data entry profile for the entry of employee-related data. The profile defines which fields are available for data entry and the target applications to which data is to be transferred, for example.
  - HR mini-master (personnel number and personal data of the employees for whom data is to be entered). You can store various employee-specific default values for CATS in the *Time Sheet Defaults* infotype (0315).
  - Applicable authorizations for working with the time sheet

Time Management: Unit Summary

You are now able to:

- Describe the basic elements of Time Management
- Record time data
- Describe an example for time evaluation
- Explain Shift Planning
- Use the Cross-Application Time Sheet

Exercises

Unit: Time Management

Topic: Time Recording

At the conclusion of these exercises, you will be able to:

- Maintain time data using the Time Manager's Workplace (TMW)
- Display time data entered in the TMW in the individual infotypes

All employees work according to a given work schedule. The time administrator enters an employee's leave in the system, for example.

1-1 The Time Manager's Workplace is a tool that can be personalized for each user. Have a look at your user parameters and write out the following parameters that configure the TMW for you.

PT_TMW_PROFILE: ___________________________

PT_TMW_TDLANGU: ___________________________

1-2 Access the Time Manager's Workplace and check whether your four employees are in the employee list. If an employee is missing, maintain the *Time* field under *Administrator* in the *Organizational Assignment* infotype for the relevant personnel number.

1-3 Record the following situations for your employee *Hans Kemm*:

1-3-1 **Doctor's Appointment:** Hans has a doctor's appointment from 10:00 to 12:00 a.m. on a workday in the middle of next month. Use "**DOC**" as the time data ID.

1-3-2 **Overtime**: In addition to his normal work schedule, Hans works overtime from 5:00 pm to 7:00 pm on a workday in the middle of next week. Use "**OT**" as the time data ID.

1-3-3 **Leave**: Hans has requested leave for the first two weeks of next month. Maintain this in the calendar view, using "**L**" as the time data ID.

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1-4 Exit the Time Manager's Workplace and access the time data maintenance function (individual infotype maintenance). Display the data you maintained in the TMW in the relevant infotypes and work out the following relationships between the time data IDs in the TMW and the infotypes and subtypes:

Situation	***ID***	***Infotype***	***Subtype***
Leave	L		
Overtime	OT		
Doctor's appointment	DOC		

1-5 In the individual infotype maintenance function, maintain standard annual leave for Anna Meyer for the last week of next month.

1-6 Check that the leave record you have just maintained is also visible in the TMW for Anna Meyer.

1-7 Display the quota overview for personnel number 310 01 100.

Solutions

Unit: Time Management

Topic: Time Recording

1-1 The Time Manager's Workplace is a tool that can be personalized for each user. Have a look at your user parameters and write out the following parameters that configure the TMW for you.

From the menu, choose System -> User Profile -> Own Data. Choose the *Parameters* tab.

The parameters relevant for the task are:

PT_TMW_PROFILE:	**Z_HR100_Time_Admin**
PT_TMW_TDLANGU:	**SET_XX/001**

1-2 Access the Time Manager's Workplace and check whether your four employees are in the employee list. If an employee is missing, maintain the *Time* field under *Administrator* in the *Organizational Assignment* infotype for the relevant personnel number.

In the Easy Access Menu, navigate to *Human Resources* > *Time Management* > *Administration* > *Time Manager's Workplace*.

If your four employees do not appear in the employee list, check the Organizational Assignment infotype (0001) for the missing personnel numbers. The value *G##* has to be entered in the *Time* field under *Administrator.* Enter the missing information as required, then exit and re-enter the TMW.

1-3 Record the following situations for your employee *Hans Kemm*:

1-3-1 Doctor's appointment

Double-click on Hans Kemm to edit his time data.

In the calendar, select a working day in the middle of next week.

In the *Time Data* tab page, select *DOC* from the *Time Data ID* column, and enter the start time of 10:00 and the end time 12:00. Choose *Enter* to confirm the entries. Save your entries.

1-3-2 Overtime

In the calendar, select a working day in the middle of next week.

In the *Time Data* tab page, select *OT* from the *Time Data ID* column, and enter the start time of 17:00 and the end time 19:00. Choose *Enter* to confirm the entries. Save your entries.

1-3-3 Leave

In the calendar, select the first two weeks of next month.

Choose *Create* and enter *L* in the time data ID field. Choose *Enter* to confirm the entries. Save your entries.

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1-4 Exit the Time Manager's Workplace and access the time data maintenance function (individual infotype maintenance). Display the data you maintained in the TMW in the relevant infotypes and work out the following relationships between the time data IDs in the TMW and the infotypes and subtypes.

Exit the TMW and, from the menu, choose *Time Management ->Administration -> Time Data -> Maintain.*

Display an overview of the *Attendances* and *Absences* infotypes for the current year for Hans Kemm.

Situation	***ID***	***Infotype***	***Subtype***
Leave	L	***Absences***	***0100***
Overtime	OT	***Attendances***	***0801***
Doctor's appointment	DOC	***Absences***	***230***

1-5 In the individual infotype maintenance function, maintain standard annual leave for Anna Meyer for the last week of next month.

Create a record of the *Absences* infotype for Anna Meyer (100991##).

Select the subtype *0100.*

Use the possible entries help to determine the start and end dates of the data record.

Save the record.

1-6 Check that the leave record you have just maintained is also visible in the TMW for Anna Meyer.

Access the Time Manager's Workplace.

Select Anna Meyer from the employee list and display the calendar view for the next month. The last week should be marked as leave.

1-7 Display the quota overview for personnel number 310 01 100.

Exit the TMW and, from the menu, choose *Time Management ->Administration -> Time Data -> Quota Overview.*

Enter the personnel number 31001100 and choose *Enter* to confirm.

Exercises

Unit: Time Management

Topic: Time Evaluation

At the conclusion of these exercises, you will be able to:

- Change an employee’s Time Management status
- Maintain time events manually, run time evaluation, and correct errors in the TMW

In the following exercises, you carry out the “positive time management” scenario for Simone Kopp (100993##).

You have to modify her master data so that she can be included in time evaluation (exercise 2-1).

You manually enter the time events that in practice would be uploaded from a terminal (exercise 2-2).

In practice, time evaluation runs automatically overnight; you start the report manually (exercise 2-3).

2-1 Simone Kopp switched from negative to positive time management two working days ago.

2-1-1 Copy the *Planned Working Time* infotype as of this time and change the Time Management status to *Time evaluation of actual times*.

2-1-2 Save the *Time Recording Information* infotype. What has brought you to this infotype?

____

2-2 In the *Maintain Time Data* transaction, choose *List Entry,* and maintain the following time events for Simone Kopp:

2-2-1 On the first day of positive time management, Simone arrived at work at 08:01 (time event P10) and went home at 16:58 (time event P20).

2-2-2 The next working day, she arrived at 07:59, but forgot to clock out in the evening.

2-2-3 Today, she arrived at 08:05.

2-3 Run time evaluation for Simone Kopp. Use personnel number *100993##,* evaluation schema *TM00,* the variant *SAP&TEDT,* and specify that you want to see the log.

2-4 Access the TMW and display Simone Kopp's data.

2-4-1 Go to message processing.

2-4-2 Correct the error by entering and saving a time event, *P20 – Clock-out* for *17:00*.

Solutions

Unit: Time Management

Topic: Time Evaluation

2-1 Simone Kopp switched from negative to positive time management two working days ago.

2-1-1 Copy the *Planned Working Time* infotype as of this time and change the Time Management status to *Time eval. (act)*.

Start the *Maintain* transaction from your Favorites in the SAP Easy Access menu.

Copy the *Planned Working Time* infotype for Simone Kopp (100993##).

Enter the date of the day two working days before today as the start date of the new data record.

In the *Time Management* field, enter the value *Time eval. (act)* and save your entries.

2-1-2 Save the *Time Recording Information* infotype.

Save the *Time Recording Information* infotype.

What has brought you to this infotype?

A dynamic action.

2-2 In the *Maintain Time Data* transaction, choose *List Entry,* and maintain the following time events for Simone Kopp:

In the Easy Access Menu, navigate to *Human Resources -> Time Management -> Administration -> Time Data -> Maintain*.

Choose the *List Entry* button to access the *Time Events* infotype for this month for Simone Kopp (100993##).

2-2-1 On the first day of positive time management, Simone arrived at work at 08:01 (time event P10) and went home at 16:58 (time event P20).

2-2-2 The next working day, she arrived at 07:59, but forgot to clock out in the evening.

2-2-3 Today, she arrived at 08:05.

Enter the required data in the Date, Time, and Time Events columns in the list entry screen.

Save your entries.

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2-3 Run time evaluation for Simone Kopp. Use personnel number *100993##,* evaluation schema *TM00,* the variant *SAP&TEDT,* and specify that you want to see the log.

In the Easy Access Menu, navigate to *Human Resources -> Time Management -> Administration -> Time Evaluation -> Time Evaluation*.

In the *Personnel no*. field, enter the value *100993##*. Choose the *Program Options* button, select *Display Log,* and choose *Select.* Confirm your selection with *Enter*.

Run time evaluation.

You can see the error resulting from the previous exercise in the report log.

… Optional Exercises

2-4 Access the TMW and display Simone Kopp's data.

In the Easy Access Menu, navigate to *Human Resources* > *Time Management* > *Administration* > *Time Manager's Workplace*.

Double-click on Simone Kopp to display her data.

2-4-1 Go to message processing.

From the menu, choose *Goto -> Process messages*.

2-4-2 Correct the error by entering and saving a time event, *P20 – Clock-out* for *17:00*.

Go to the *Time Events* tab page and maintain the *P20* time event for *17:00* on the day of the error.

Save your data.

Exercises

Unit: Time Management

Topic: Cross-Application Time Sheet

At the conclusion of these exercises, you will be able to:

- Record time data in the Time Sheet
- Release your time data for approval

Some of the employees at your company use the Cross-Application Time Sheet to record their time data. After being released, the data is approved and transferred to the Time Management component.

3-1 Default values for the time sheet can be entered in the *Time Sheet Defaults* infotype (0315). Display the infotype for Anna Meyer (100991##).

3-2 Enter the following time data for Anna Meyer (100991##) in the Cross-Application Time sheet, using the "*HR*" profile.

3-2-1 Enter 7.5 hours of attendance for yesterday.

3-2-2 Enter 5 hours of attendance and 2.5 hours for a partial-day doctor's appointment for today.

3-2-3 Enter 7.5 hours of leave for another workday in this week.

3-2-4 Check your entries and release the times for approval.

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3-3 Approve the data you entered and released for Anna Meyer (100991##) in the first exercise.

3-4 Transfer Anna's (100991##) approved times to the HR system.

3-5 Check the transferred time data in Time Management:

3-5-1 Check whether the transferred time data is entered in the *Attendances* infotype for Anna Meyer (100991##).

3-5-2 Check whether the transferred time data is entered in the *Absences* infotype for Anna (100991##).

Solutions

Unit: Time Management

Topic: Cross-Application Time Sheet

3-1 Default values for the time sheet can be entered in the *Time Sheet Defaults* infotype (0315). Display the infotype for Anna Meyer (100991##).

In the Easy Access Menu, navigate to *Human Resources -> Personnel Management -> Administration -> HR Master Data -> Display*.

In the *Infotype* field, enter the *315* and choose *Display*.

3-2 Enter the following time data for Anna Meyer (100991##) in the Cross-Application Time sheet, using the "*HR*" profile.

In the Easy Access Menu, navigate to *Human Resources -> Time Management -> Time Sheet - > CATS classic -> Record Working Times*.

Select the data entry profile *HR* and the personnel number *100991##. Choose Record Time Data.*

3-2-1 Enter 7.5 hours of attendance for yesterday.

Enter 7.5 in the column for yesterday's date and choose *Enter* to confirm. The system automatically proposes the attendance type "0800 = Attendance Hours."

3-2-2 Enter 5 hours of attendance and 2.5 hours for a partial-day doctor's appointment for today.

In the same row, enter 5 in the column for today's date.

In a new row, enter *0230 = Doctor's appointment* in the *Attendance/Absence Type* field and enter 2.5 in the column for today's date.

3-2-3 Enter 7.5 hours of leave for another workday in this week.

In a new row, enter *0100 = Leave* in the *Attendance/Absence Type* field and enter 2.5 in the column for today's date.

3-2-4 Check your entries and release the times for approval.

Switch to the release view by choosing the *Release View* button.

Check that all the values are correct for the given situations.

Select all three rows and choose the *Release* button.

Save your entries.

… Optional Exercises

3-3 Approve the data you entered and released for Anna Meyer (100991##) in the first exercise.

In the Easy Access Menu, navigate to *Human Resources -> Time Management -> Time Sheet - > Approval -> Approve Working Times*.

In the *Personnel no*. field, enter the value *100991*## and run the report.

Hold down the Shift button and select all the rows.

Click on the *Approve* button.

3-4 Transfer Anna's (100991##) approved times to the HR system.

In the Easy Access Menu, navigate to *Human Resources -> Time Management -> Time Sheet -> Transfer -> Human Resources*.

In the *Personnel no*. field, enter the value *100991*## and run the report.

Review the log.

3-5 Check the transferred time data in Time Management:

In the Easy Access Menu, navigate to *Human Resources -> Time Management -> Administration -> Time Data -> Maintain*.

3-5-1 Check whether the transferred time data is entered in the *Attendances* infotype for Anna Meyer (100991##).

Enter the personnel number *100991*## and display the overview of the *Attendances* infotype.

3-5-2 Check whether the transferred time data is entered in the *Absences* infotype for Anna (100991##).

Enter the personnel number *100991*## and display the overview of the *Absences* infotype.

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Reporting and Analysis Tools

Contents:

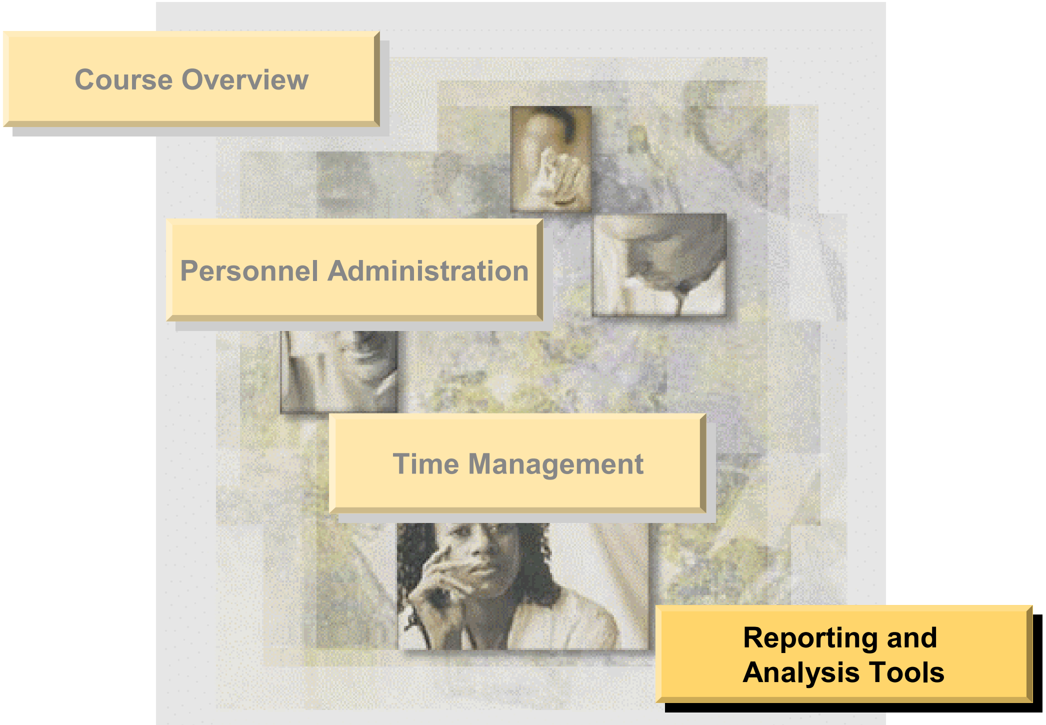
- Reporting and Analysis Tools

Reporting and Analysis Tools: Unit Objectives

At the conclusion of this unit, you will be able to:

- Select and execute standard reports from the SAP Easy Access Menu
- Describe the Human Resources Information System and Manager's Desktop
- Use Ad Hoc Query to create reports
- Describe the connectivity between HR and BW

Reporting and Analysis Tools: Overview Diagram



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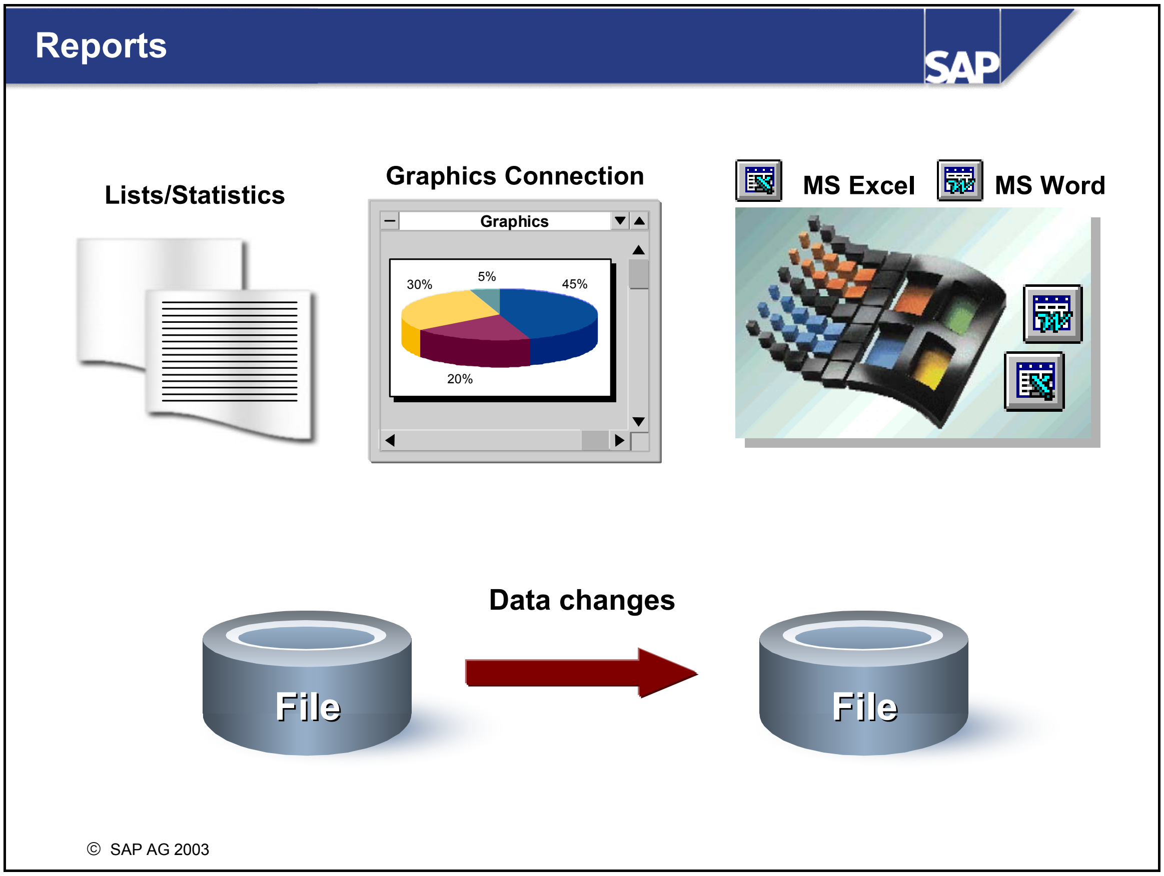
Reporting and Analysis Tools: Business Scenario

- **The departments within your enterprise must regularly create reports for different types of personnel data.
To do this, they use the various R/3 Human Resources reporting functions.**



- Reporting plays a decisive role in Human Resources. HR administrators are confronted daily with large volumes of data that must be recorded and analyzed. ABAP reports are available for this purpose.
- The standard system includes a large number of reports to help you meet your reporting requirements. They enable you to define your own search criteria and then create lists of employees and employee data, for example, or perform statistical evaluations. Many reports can be viewed as lists or they can be exported to a PC application.

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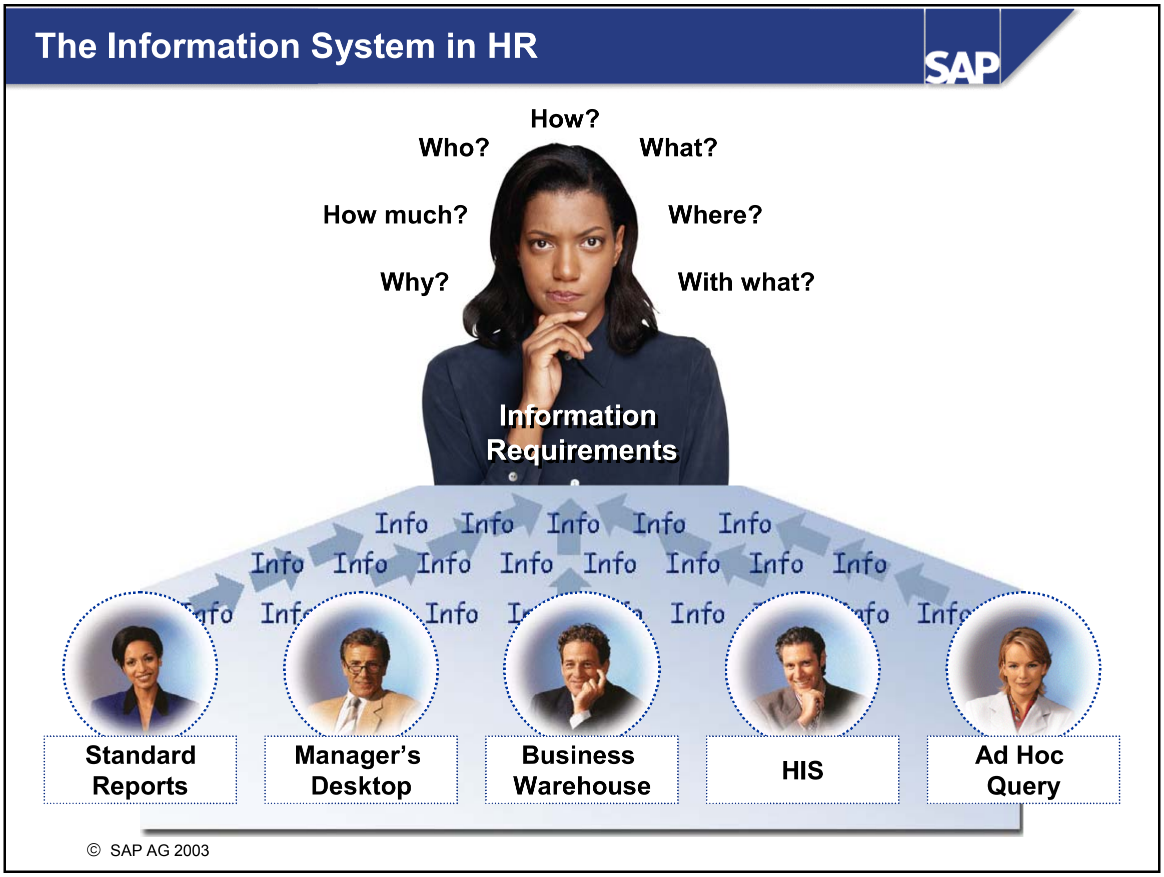
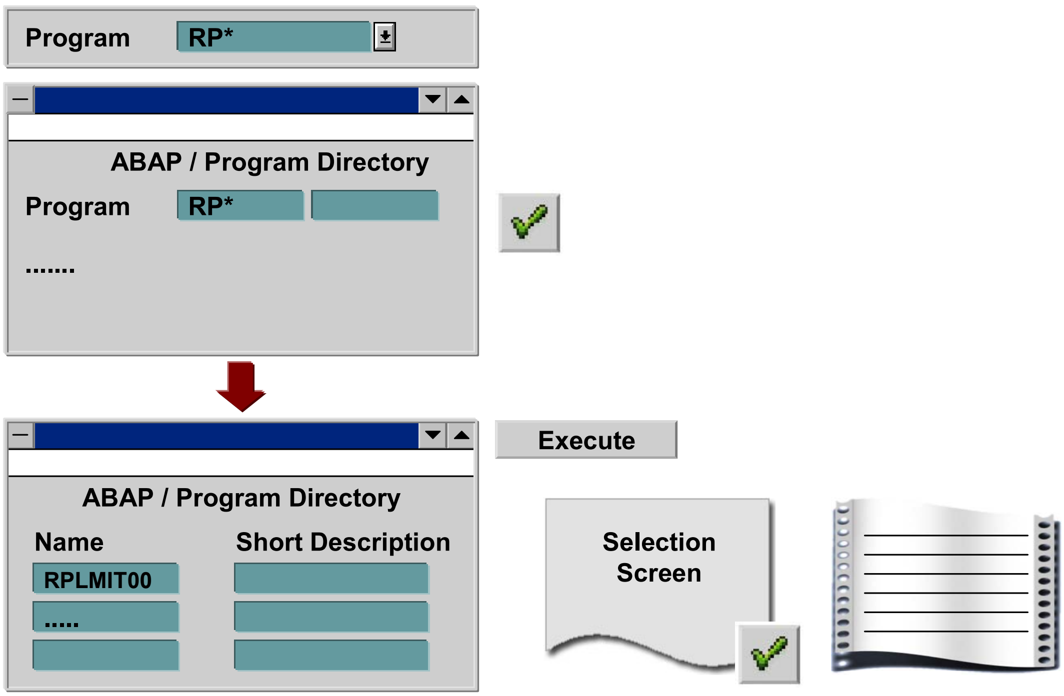


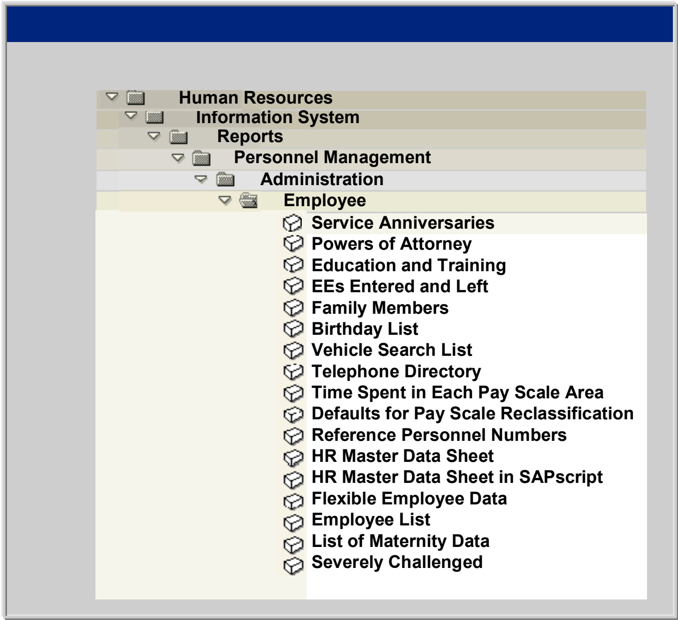
- **Ad Hoc Query** enables you to create reports. As of 4.6C, Ad Hoc Query is integrated into SAP Query. Although it is called InfoSet Query in other R/3 components, it remains Ad Hoc Query within the Human Resources component.
- You can access **standard reports** from the SAP Easy Access Menu or using general report selection.
- The **Human Resources Information System** (HIS) makes it easy for you to request and start all HR reports within Structural Graphics.
- **Manager's Desktop** is a tool specifically for managers in which they can analyze and change data.
- The **Business Warehouse** is an independent system in which analyses can be performed. SAP delivers business contents in the form of Business Content.

General Report Selection



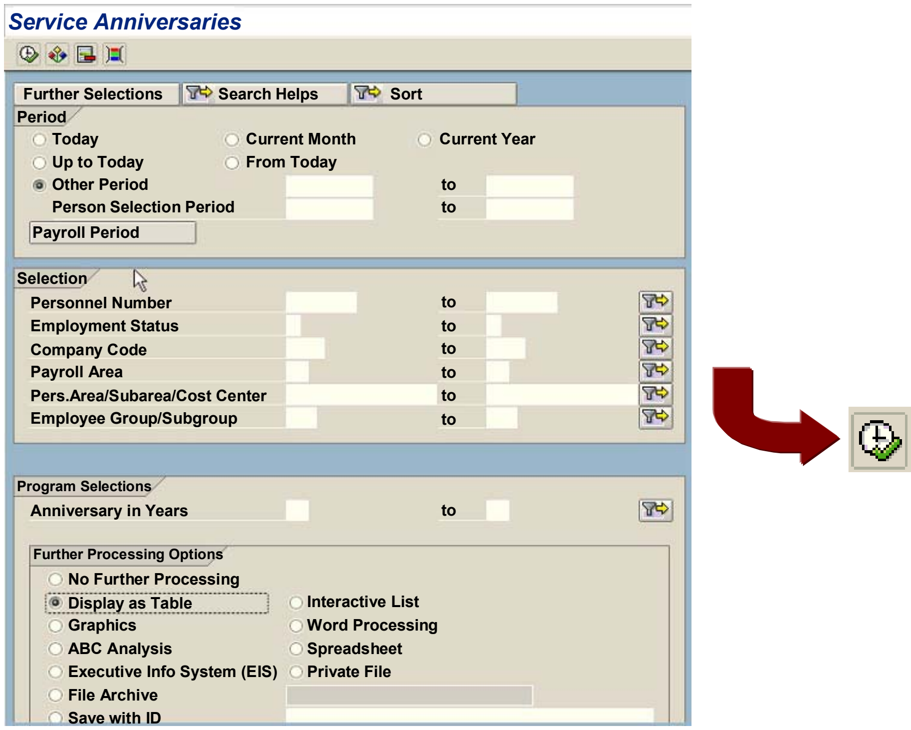
- Some reports cannot be accessed by using menu paths or general report selection. Instead, you must access them by choosing **System -> Services -> Reporting**.
- On the initial screen, you can enter RP* and then use the subsequent report to display an overview of all reports. You can enter more specific generic search criteria by using the following naming conventions:
  - RPL* Lists
  - RPS* Statistics
  - RPC* Payroll reports
  - RPU* Utility reports
  - RPT* Time management reports
  - RPAPL* Applicant data reports
  - RPI* Reports for creating batch input sessions
  - RH* Reports for personnel planning

Information System Reports



- In addition to tools for creating reports, SAP also provides a large number of important standard reports for all SAP applications. The reports are started from the main information system in the SAP Easy Access Menu or from an information system of a component or subcomponent.
- After the information system for human resources has been called, a standard report can be started or you can create a report with a tool (Ad Hoc Query, SAP Query, HIS). Reports that are created using the Ad Hoc Query or the SAP Query can be saved and added to the standard report structure. You can change standard reports in Customizing.
- Before a specific report can be accessed, different hierarchy levels must exist in each component. Usually, the reports can be found at the lowest level of the information system from where you can execute them.

Report Selection Screen (Example)



- The report selection screen contains a series of selection options that enable you to determine the criteria used to execute a R/3 Human Resources report. Each selection option has two fields which you can use to specify a single value (by entering a minimum value in the first field only) or a value range (by entering a maximum value in the second field as well). By choosing specific selection options and values, you can determine the dataset to be read and the result of the report. The latter is derived from the evaluation of employee records and is output either as a list of employees, or as a numerical analysis of data on these employees.
- To make generic entries, use *. To make masked entries, use +.

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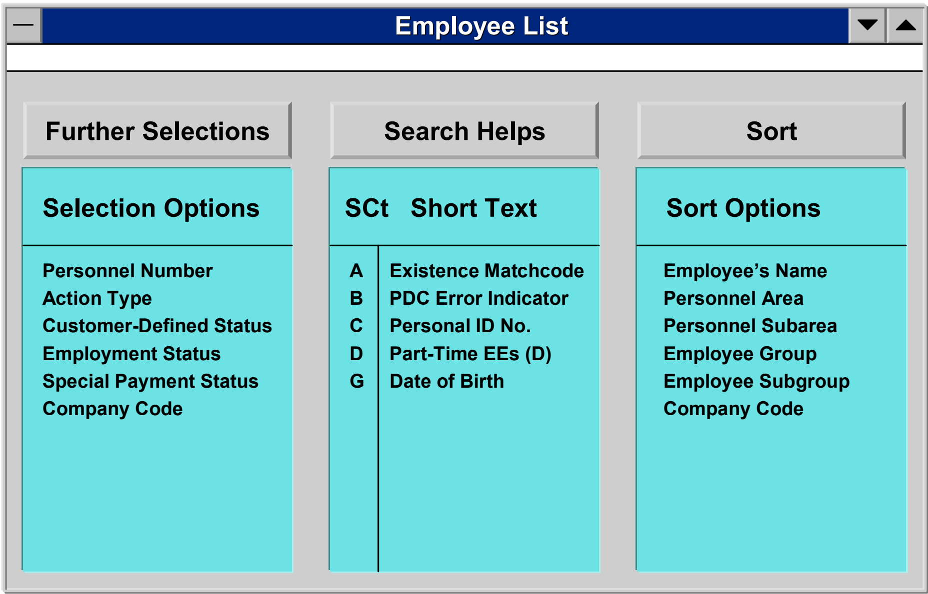
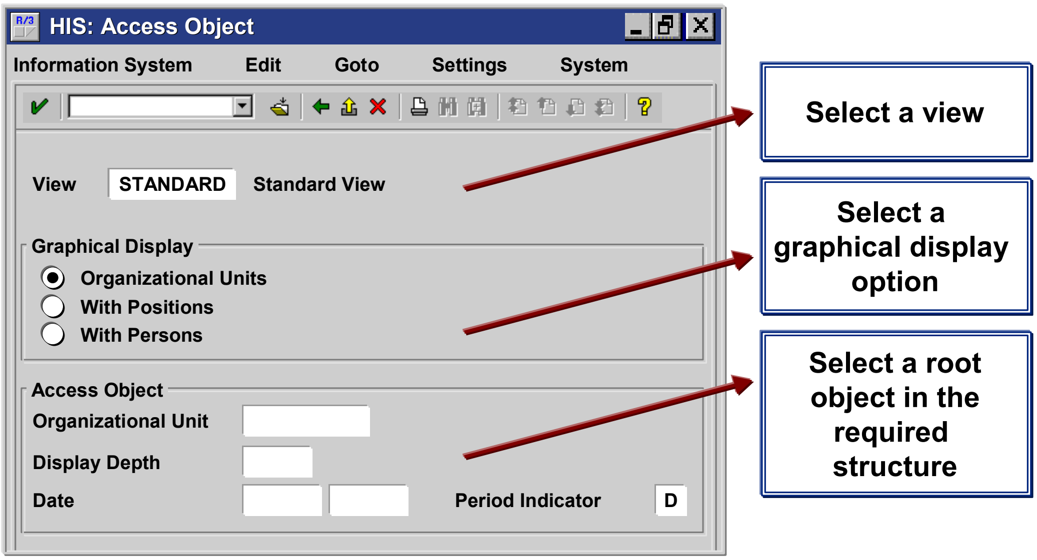
Enhancements to the Report Selection Screen



- The report selection screen contains a series of default selection options that are used by the system to create a list of employees, for example, or a statistical evaluation. However, these defaults do not necessarily include all of the selection options that you require for your report run. The *further selections* function enables you to add selection options to the report selection screen, and delete existing selection options.
- The matchcode function on the selection screen allows you to select the employees for which you want the report run.
- The *sort* function enables you to use up to seven criteria to sort the list of employees or employee data created by the report. The effects of the sort function become apparent when a list report is output, but not when a statistical evaluation is output.
- If you want to reuse selection values that you have set for a report, save them as a variant. Each time you call the variant, the system automatically writes its values to the individual selection fields.

Accessing the Human Resources Information System



- When you access HIS, specify the data to be displayed in Structural Graphics. The view determines the possible display options.
- **Procedure:**
  1. Select a graphical display option.
  2. Select the root object of the organizational structure you require.
  3. If necessary, specify a selection period (the default value is the system date).
  4. Choose Start.
- **Note:**
  To be able to use HIS, you must have implemented Organizational Management.

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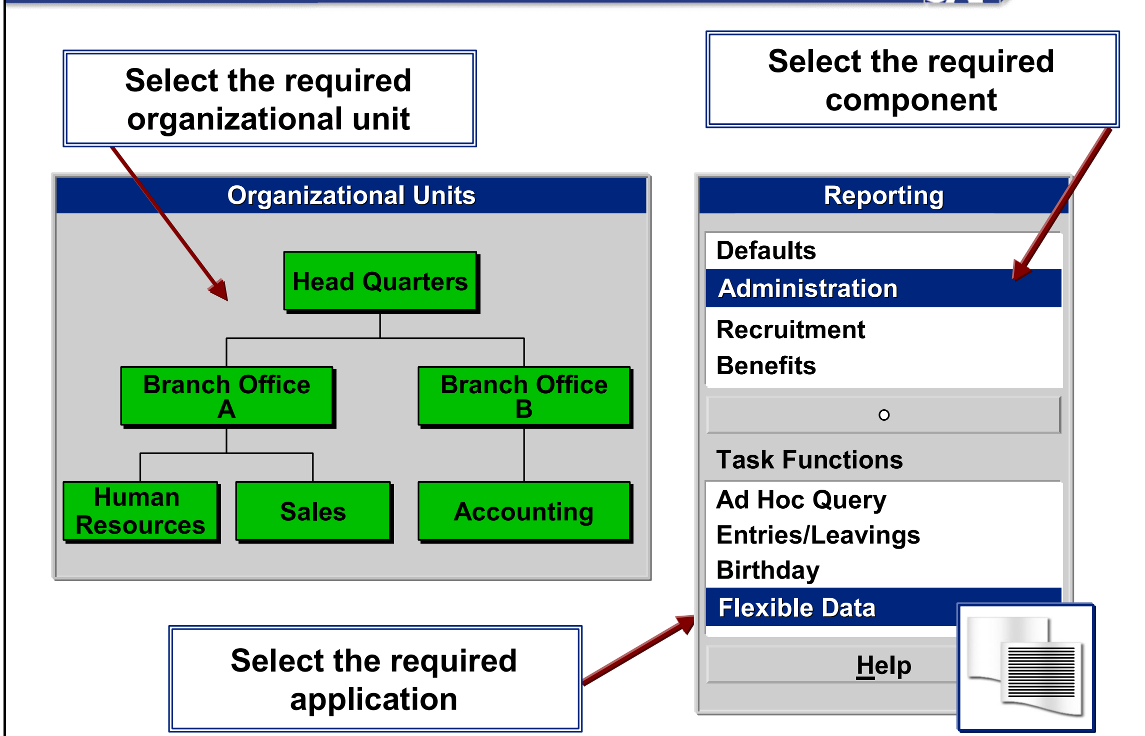
Starting Reporting



- The graphic displays the requested organizational structure. A second window lists the available reports.
- The upper section of the window lists the areas available. After you have selected an area, the reports available for this area are listed in the lower section of the window.
- If you have selected at least one object in the graphic, the report is started. The report results are displayed in an additional window.
- **Procedure:**
  1. Select one or more organizational units in the Structural Graphics window.
  2. Choose the report you want to start by double-clicking on it.
  3. The report runs for all of the persons or data assigned to the organizational unit specified in step 1.

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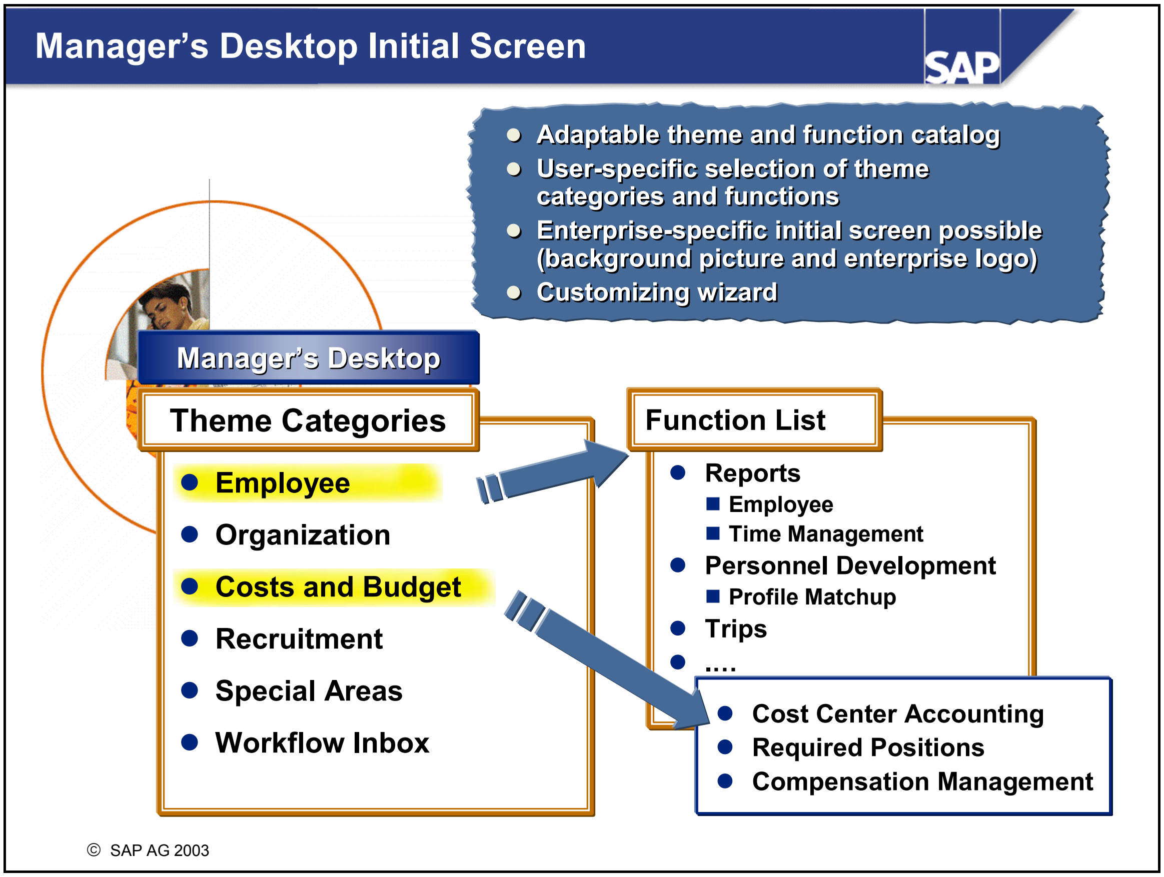
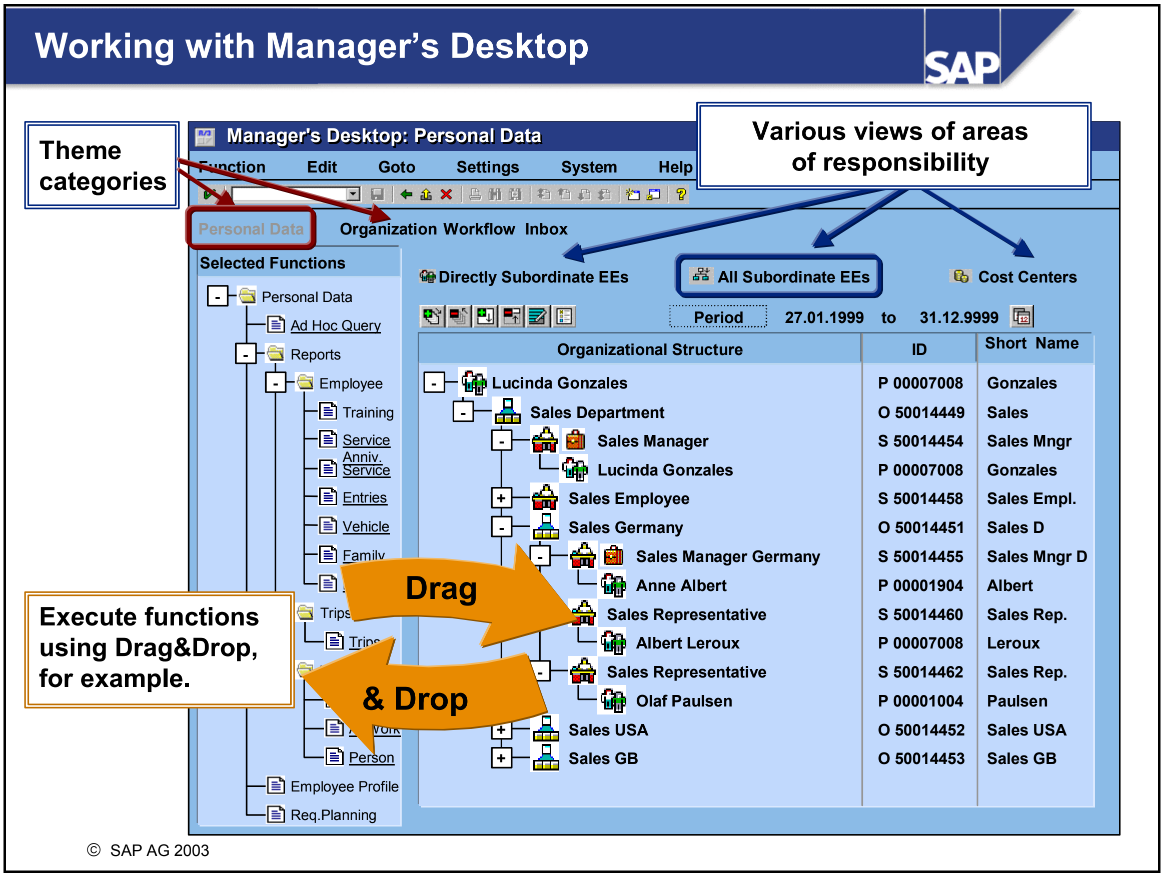
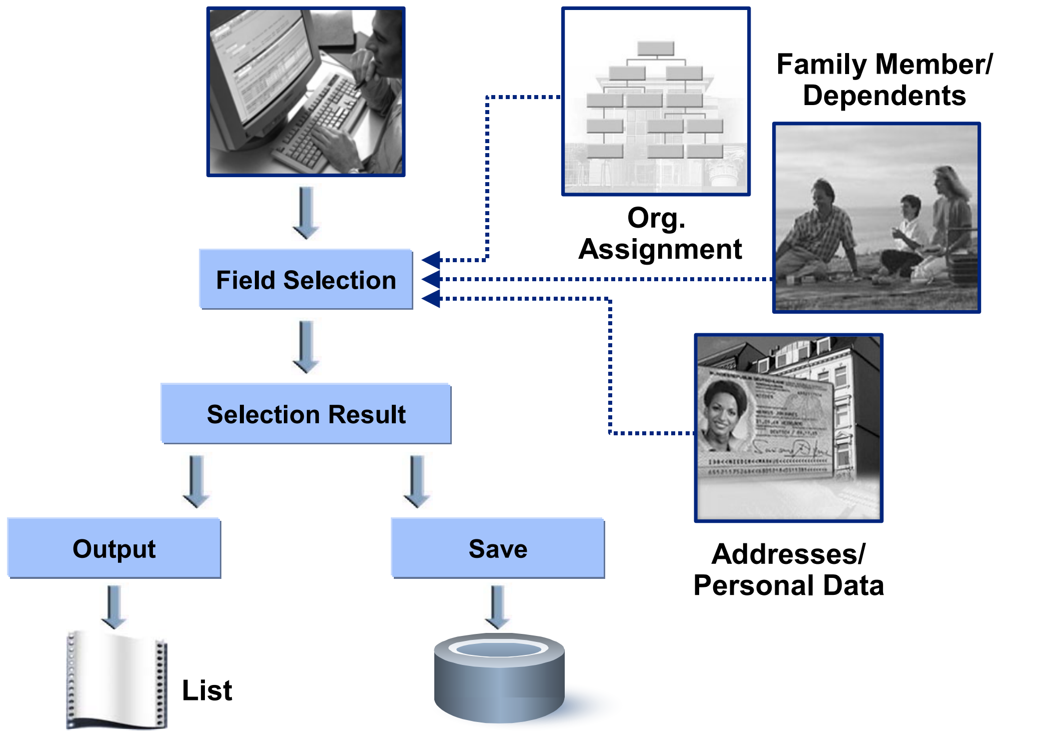


- The initial screen provides an overview of the default main scenario in Manager's Desktop, which consists of the five theme categories listed above and their function lists. In Customizing, you can use function codes to organize these categories into customer-specific hierarchies. The categories can also be enhanced with customer-specific functions.
- Furthermore, the user can deactivate unnecessary categories and functions on the initial screen and on the various screens of the different application components. It is always possible to switch between user settings and standard settings.
- The initial screen can be adapted to customer-specific requirements in Customizing. For example, it can be enhanced with an enterprise logo and/or background picture.



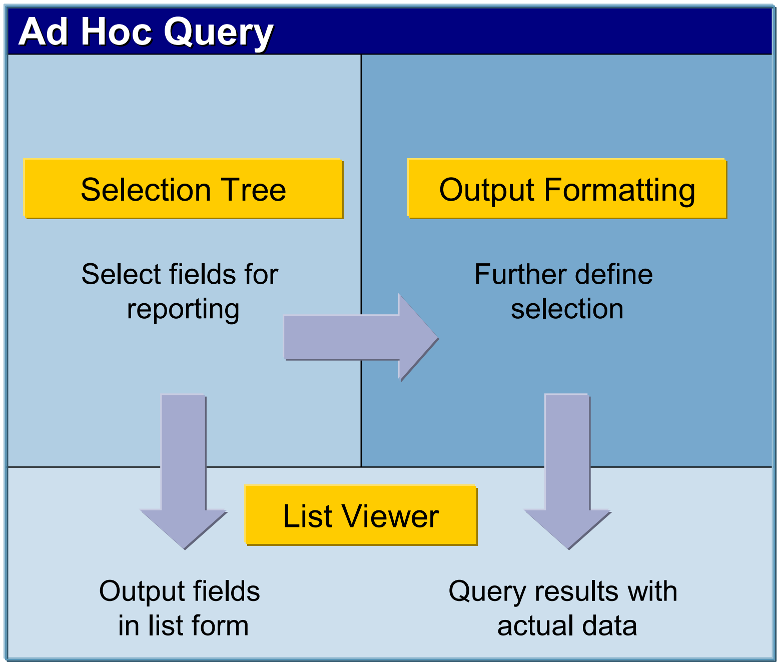
- The screen is divided into two areas. The right of the screen displays the area of responsibility, whilst the left of the screen displays the possible functions in a function tree.
- The tab pages displayed in the right-hand screen area enable you to generate different views of the organizational structure for your area of responsibility. Therefore, the organizational objects, for which the functions in the left-hand screen area can be executed, are displayed here.

Ad Hoc Query



- Ad Hoc Query is a simple but powerful tool for reporting on Human Resource data. It enables you to access data from all Human Resource areas by choosing selection and output fields.
- Ad Hoc Query can be used for data stored in Recruitment, Master Data, Time Management, and Personnel Planning and Development (person-related data).
- Programming skills are not required. You choose the selection and output fields on a screen.
- **Note**:
  Unlike all other reporting tools, the selection is made directly from the database for persons or objects. In other words, personnel numbers are only selected if they meet the criteria. Accessing the database directly significantly improves performance.
- **Note**:
  Standard authorization checks take place at the infotype and organizational assignment levels.

Ad Hoc Query Screen: All Functions



- The Ad Hoc Query is based on InfoSets and user groups. You specify both within the SAP Query. InfoSets are assigned to user groups, which groups users together. InfoSets enable you to group infotype fields and calculated fields together as required. InfoSets only display positions that are required by the user. This means that the program is easier to operate.
- The hit list enables you to further define values before the final output.
- Queries can be saved and reused for similar queries in the future.
- As of 4.6C, the following functions are available:
  - One screen contains all functions: field selection, selection criteria, output formatting, query results, interactive function of the SAP List Viewer (for example, export to Excel).
  - Drag&Drop for easy selection of selection and output fields
  - Example data is replaced by real data in the output area.
  - Text, value or both (denoted by a ‘t‘ next to the field selection) is selected by using the right mouse in the selection criteria fields.
  - Ad Hoc Query can now be used to report on objects from Personnel Planning, provided the required InfoSet has been created.

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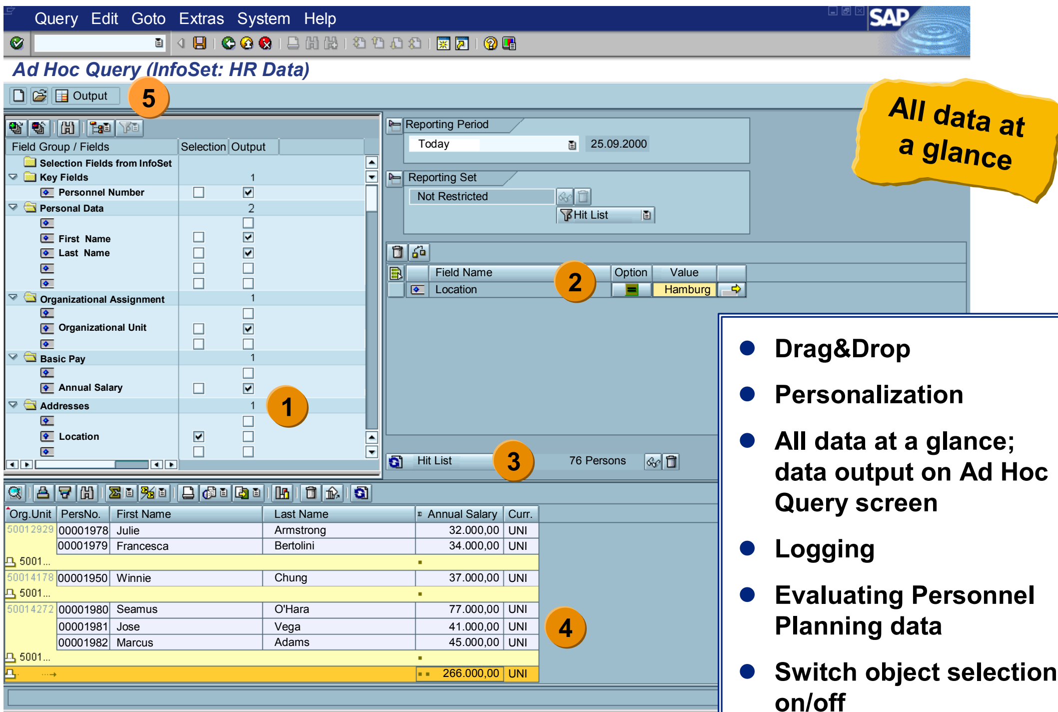
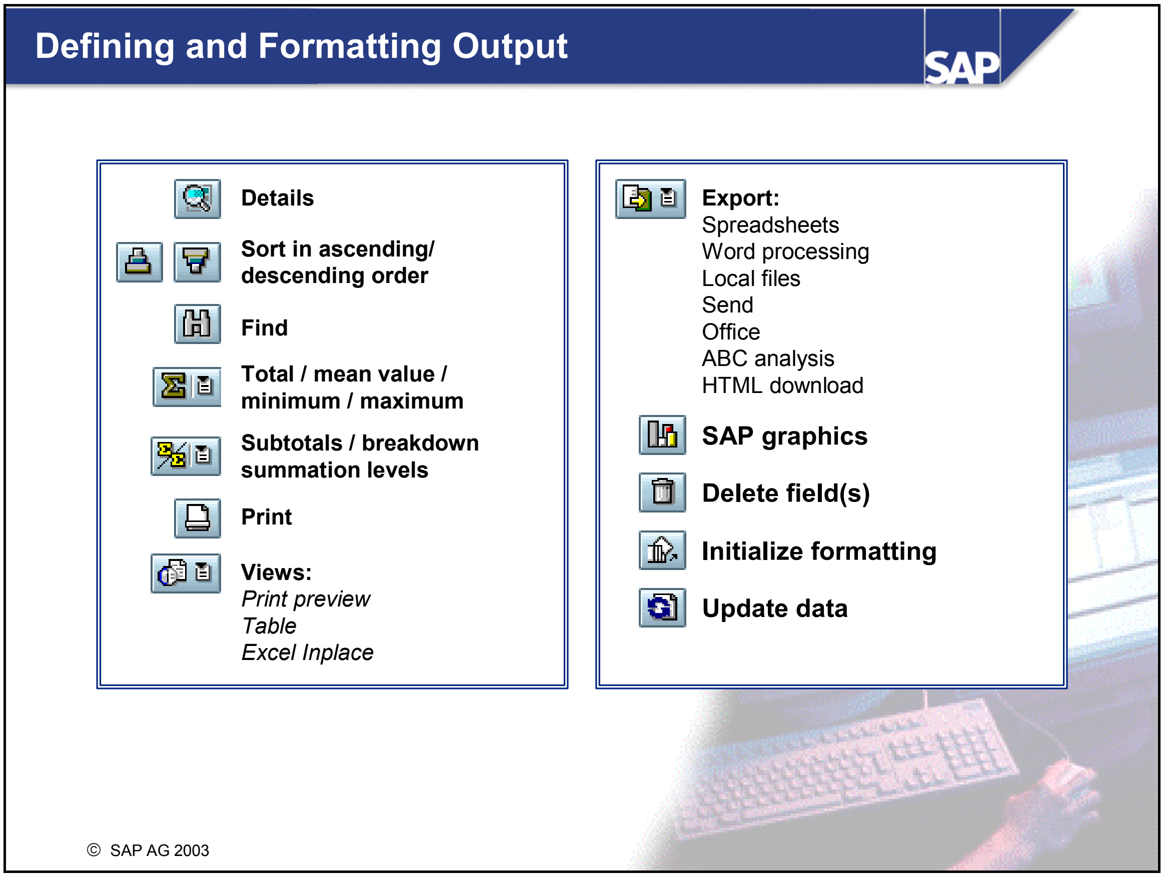
Ad Hoc Query: Overview



- Drag&Drop
- Personalization
- All data at a glance; data output on Ad Hoc Query screen
- Logging
- Evaluating Personnel Planning data
- Switch object selection on/off

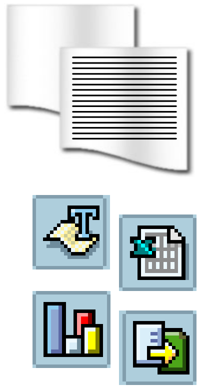
- You can select **selection and output fields** simply by using **Drag&Drop**. To do this, select one or more fields and drag them to the required area (selection or output). In the case of fields for which **values** and relating **texts** exist, you can choose whether you want the text or value, or both, to be used.
- Your **user settings** are reloaded the next time you start the Ad Hoc Query, for example, the queries you last accessed. This applies to when you exit the Ad Hoc Query or when you log off from the system.
- You can display **real data** in the **output preview**.



- The output preview enables you to obtain an impression of how the layout of the output list will look before data is actually output. It also allows you to format the output list.
- You can:
  - Sort the list according to one or more columns
  - Cumulate numeric columns in basic lists and obtain subtotals (non-numeric columns) using certain criteria
  - Delete all output fields simultaneously
  - Initialize formatting
- Use the context menu to determine whether additional columns (mean value, proportion in %, and total number) should be output for ranked lists and statistics.
- Choose the output format. The output format determines how data is displayed in the output. You can choose between different list outputs and export functions such as output for spreadsheet. In this instance, the list is not displayed on the screen, but rather the analysis is transferred to a file that you can further process using a spreadsheet program.

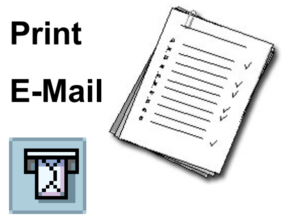
Output and Display Procedure

- SAP List Viewer
- ABAP List
- Table
- Word Processing
- Spreadsheet
- Graphics
- Local File

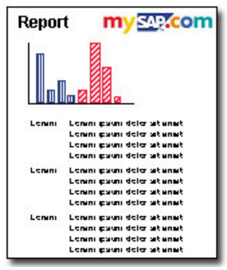


Additional functions in output lists such as:

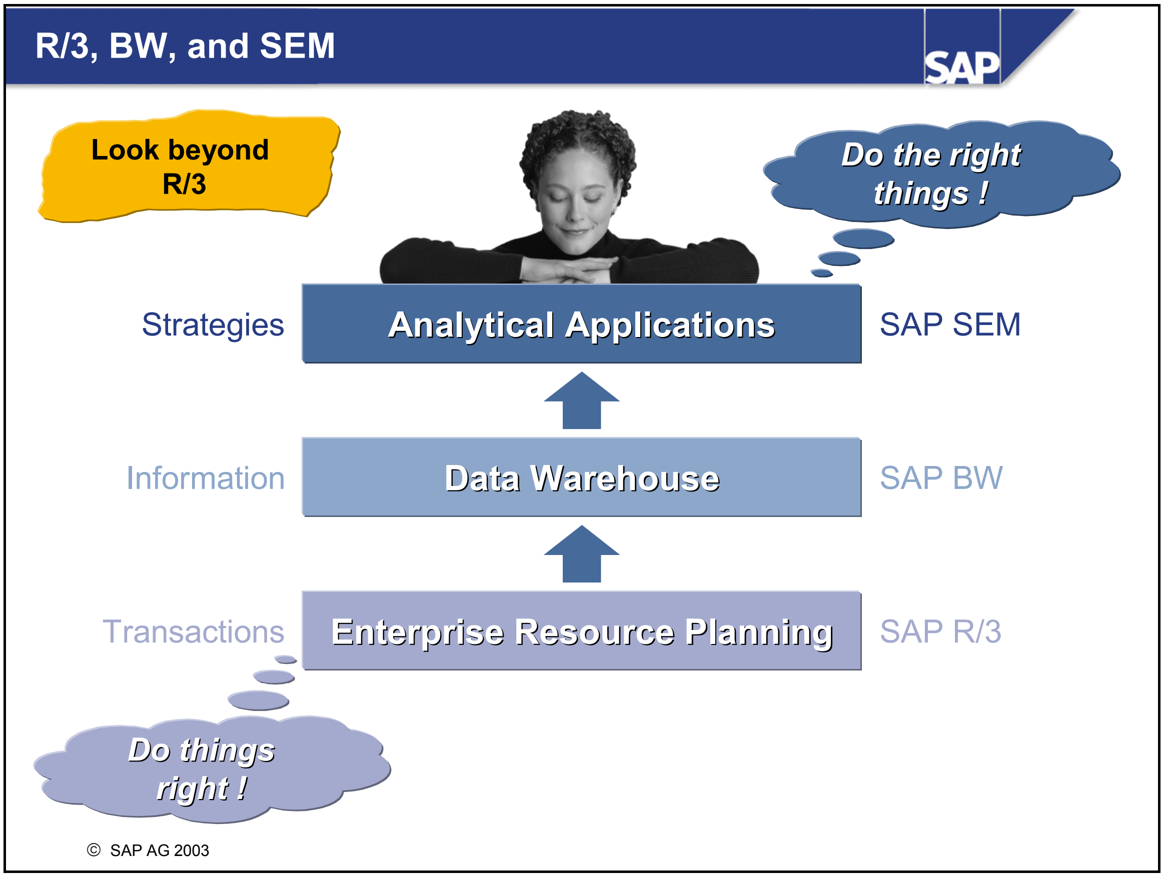
- ABC Analysis
- Print
- E-Mail



- InfoZoom
- Crystal Reports



- You can adapt the appearance of the list so that it meets your requirements. For example, you can hide unnecessary columns, or sort the contents of a table in accordance with specific criteria. You can save these settings as user-specific settings as required. This enables you to access your table time and again or set it up as a standard setting.
- You can export the displayed and modified table to MS Word and MS Excel, where you can then further process the report results.
- The *Send List* function enables you to forward the formatted report results to other users, irrespective of whether they work at the same enterprise or not.



- In addition to reporting in the R/3 System, further options exist for analyzing data.
  - SAP Business Warehouse
  - SAP Strategic Enterprise Management

R/3 and BW System Comparison

R/3 System		BW System
Depict business processes	**Objective**	Generate knowledge
High level of availability and data throughput	**Priorities**	Easy to use, flexible access
Up-to-date	**Age of data**	Historical
Insert, change, delete, and read	**Data manipulation**	Read

- The differences listed above show that contrasting business and technological requirements are placed on the systems.
- Consequently, it is particularly advantageous to use a BW system to separate (technically) from the SAP R/3 System all requirements associated with the aggregated report.

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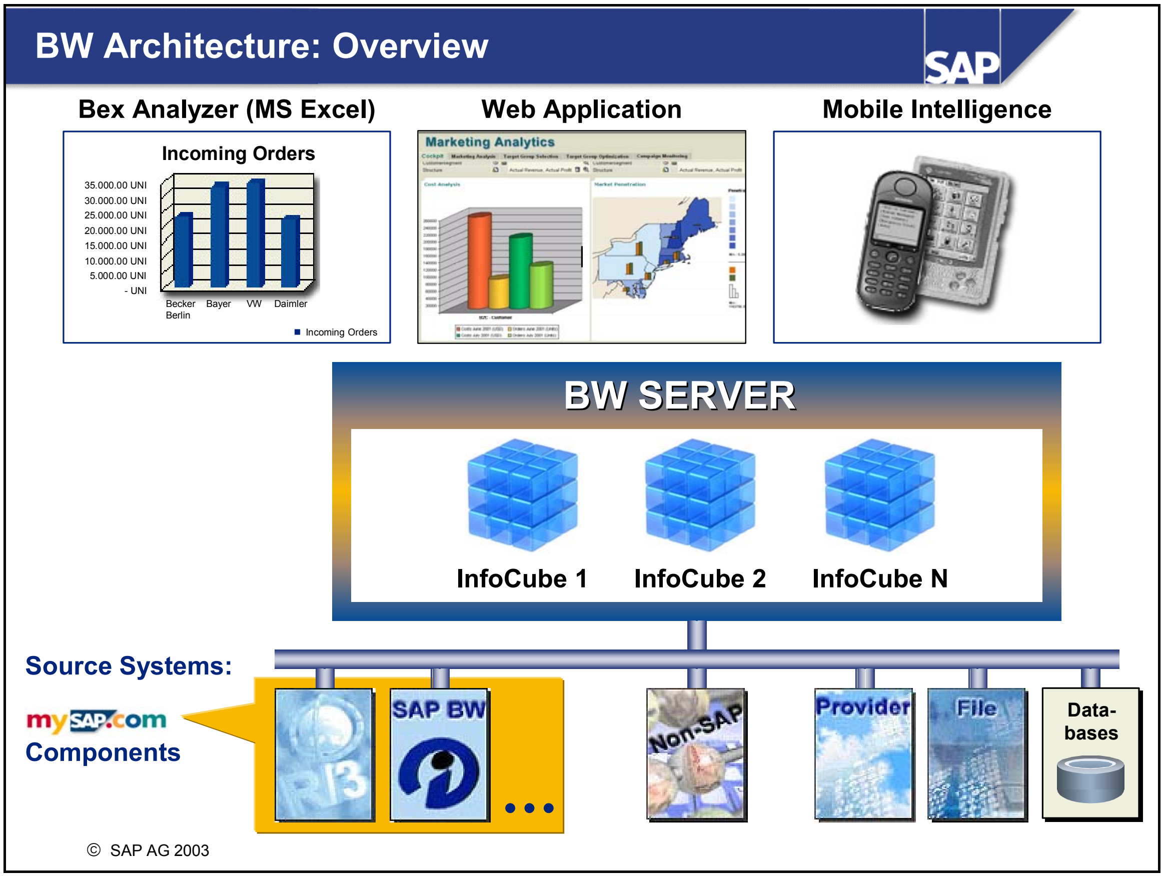

- This slide provides an overview of the SAP Business Information Warehouse in a heterogeneous system landscape.
- The lowest level shows the source systems. Source systems could include: mySAP.com components such as SAP R/3 systems, SAP Business Information Warehouses, SAP Customer Relationship Management systems, or external systems such as non-SAP systems of files.
- Metadata and application data is administrated in the Business Information Warehouse server.
- You administrate the various source systems using the Administrator Workbench in the Business Information Warehouse. In addition, you can schedule and monitor the transfer of metadata and transaction data from the assigned legacy systems using the scheduler and monitor from the Administrator Workbench.
- The Business Explorer and its reporting tools forms the third layer.

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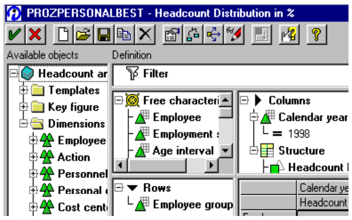
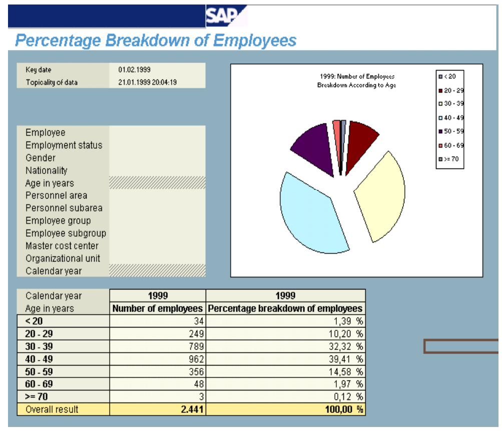
Business Explorer

Business Explorer Analyzer (MS Excel Frontend)



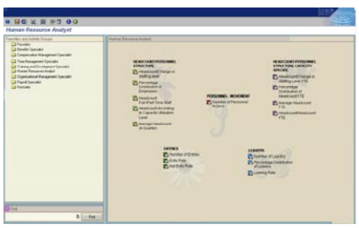
Create queries

Analyze information



Calendar year	1999	1999
Age in years	Number of employees	Percentage breakdown of employees
< 20	34	1,39 %
20 - 29	249	10,20 %
30 - 39	789	32,32 %
40 - 49	962	39,41 %
50 - 59	356	14,58 %
60 - 69	48	1,97 %
>= 70	3	0,12 %
Overall result	2.441	100,00 %

Business Explorer Browser



Publish reports
Access available standard reports
Organize personal reports

- The Business Explorer comprises two parts:
  - The *Business Explorer Analyzer* and the Report Builder can be used to create new queries and change existing ones. Data is displayed and analyzed in MS Excel. All MS Excel functions are available (such as functions for creating graphics. Graphics can also be stored in the report).
  - The *Business Explorer Browser* allows you to make queries available using the Internet or intranet. Users can easily access the queries (by double-clicking on the queries), which are then available for further analysis.

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HR Business Content

HR extractors, InfoCubes, and queries are available for the following areas:

- Personnel Administration
- Recruitment
- Training and Event Management
- Personnel Development
- Compensation Management
- Benefits
- Organizational Management
- Payroll
- Time Management

- Business Content has been created in constant collaboration with our customers. A considerable number of workshops and customer visits have been carried out in the USA, Europe, and Germany to allow us to obtain customer requirements and to check the existing Business Content. Business Content is continually being further developed on the basis of customer input.

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Reporting and Analysis Tools: Summary

You are now able to:

- Select and execute standard reports from the SAP Easy Access Menu
- Describe the Human Resources Information System and Manager's Desktop
- Use Ad Hoc Query to create reports
- Describe the connectivity between HR and BW

Exercises

Unit: Reporting

Topic: Reporting and Analysis Tools^

At the conclusion of this exercise, you will be able to:

- Start reports using the Information System
- Create your own reports using the Ad Hoc Query

The departments within your enterprise must regularly create reports for different types of HR data. To do this, they use the various Human Resources reporting functions.

1 For the following tasks, use the standard reports available from the SAP Easy Access Menu.

1-1 Display all female employees in personnel subarea 0005 for personnel area CABB on today’s date.

1-2 Display all employees in personal subarea 0005 for personnel area CABB who are between 41 and 46 years of age.

2 Use the Ad Hoc Query to complete the following task. In the **standard area (client-specific)**, use **user group “HR100”** and the **Infoset “HR100”** that it contains.

2-1 Select according to the following criteria: only *female employees* who are employed in *company code CABB* and for which you are entered as *Administrator for Time Recording for G##* are to be displayed.

2-2 Display the following fields:

- Personnel Number (in ascending order)
- Form-of-Address Key (only text)
- Last Name
- Date of Birth
- Wage Type (Basic Pay) (only text)
- Total of All Wage Type Amounts
- Wage Type (Additional Payment) (only text)
- Total of Additional Payments
- Total Amount (IT0008+IT0015)

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Solutions

Unit: Reporting

Topic: Reporting and Analysis Tools

1 For the following tasks, use the standard reports available from the SAP Easy Access Menu.

1-1 Display all female employees in personnel subarea 0005 for personnel area CABB on today's date.

In the SAP Easy Access Menu, choose Human Resources → Personnel Management → Administration → Info System → Reports → Employee, and access the *Employee List* report.

In the *Personnel Area* field enter the value *CABB,* and in the *Personnel Subarea* field enter the value *0005.*

Choose the radio button, *Only Female,* and *run* the report.

Exit the output using the *Back* button, and return to the Easy Access Menu.

1-2 Display all employees in personal subarea 0005 for personnel area CABB who are between 41 and 46 years of age.

Access the *Birthday List* report.

In the *Personnel Area* field enter the value *CABB,* and in the *Personnel Subarea* field enter the value *0005.*

In the *Age of Employee* field, enter the values *41* to *46* and *run* the report.

Exit the output using the *Back* button, and return to the Easy Access Menu.

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2 Use the Ad Hoc Query to complete the following task. In the standard area (client-specific), use the user group "HR100" and the Infoset "HR100" that it contains.

Start the *Ad Hoc Query* transaction.

In the *Work Area* field, choose the value *Standard Area (Client-Specific).* In the *User Group* field, choose the value *HR100.* Select Infoset *HR100* and confirm using the *Enter* button.

2-1 Select according to the following criteria: only *female employees* who are employed in *company code CABB* and for which you are entered as *Administrator for Time Recording for G##* are to be displayed.

Access the *Organizational Assignment* field group and choose the *Company Code* and *Administrator for Time Recording* fields as *selection criteria* by selecting the relevant checkboxes.

Access the *Personal Data* field group and choose the *Gender Key* as *selection criterion* by selecting the relevant checkbox.

For the three selection criteria you have just chosen, *Company Code, Administrator for Time Recording*, and *Gender Key,* enter the values *CABB, G##,* and *2,* which were mentioned in the task, in the selection area of the screen.

Check the number of hits for the selection criteria you entered. To do this, click on the *Hit List* button.

2-2 Display the following fields:

- Personnel Number (in ascending order)
- Form-of-Address Key (only text)
- Last Name
- Date of Birth
- Wage Type (Basic Pay) (only text)
- Total of All Wage Type Amounts
- Wage Type (Additional Payment) (only text)
- Total of Additional Payments
- Total Amount (IT0008+IT0015)

Remain in the *Organizational Assignment* field group and select the *Personnel Number* field as the output field. To do this, select the relevant checkbox. Click with the right mouse button on the *Personnel Number* field, and click on *Output* > *Only Value* in the menu that is displayed.

Access the *Personal Data* field group and choose the *Form-of-Address Key, Last Name,* and *Date of Birth* fields as output fields. To do this, select the relevant checkboxes. Click with the right mouse button on the *Form-of-Address Key* field, and click on *Output* > *Only Text* in the menu that is displayed.

Access the *Basic Pay* field group and choose the *Wage Type* and *Total of All Wage Type Amounts* fields as output fields. To do this, select the relevant checkboxes. Click with the right mouse button on the *Wage Type* field, and click on *Output* > *Only Text* in the menu that is displayed.

Access the *Additional Payment* field group and choose the *Wage Type* and *Total of Additional Payments* fields as output fields. To do this, select the relevant checkboxes. Click with the right mouse button on the *Wage Type* field, and click on *Output* > *Only Text* in the menu that is displayed.

Access the *Additional Fields* field group and select the *Total Amount* field as the output field. To do this, select the relevant box.

In the selection area for the chosen selection fields, enter the selection criteria as required in the task.

Click on the *Hit List* button to check whether your selection criteria have been correctly chosen.

Start the output list by choosing the *Output* button.