

Reading Sample

The details and master data of an object are found within an object's infotype. In this reading sample, you'll learn how to maintain commonly used, mandatory, object-specific, and country-specific infotypes in Organizational Management through the Expert Mode tool.









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In Expert Mode, objects are maintained via object- and country-specific infotypes. In this chapter, we walk through the important object infotypes found in Organizational Management and how to maintain them through Expert Mode.

8 Expert Mode

Expert Mode enables users to display and edit the organizational and reporting structures of an enterprise using Infotype Maintenance and Simple Maintenance. It also helps in demonstrating and scheduling HR-relevant information changes. The mapping and editing of hierarchical and matrix type organizational structures is also executed in Expert Mode.

In this chapter, we'll discuss the various important object infotypes and the data associated with them. We'll begin by looking at object infotypes, including commonly used object infotypes, mandatory object infotypes, object-specific infotypes, and country-specific infotypes. We'll then take a closer look at the Expert Mode tool, including its screens and associated fields. Finally, we'll discuss how Expert Mode can be used to maintain objects and their infotypes.

8.1 Object Infotypes

Objects have databases like employees and applicants have. In SAP, master data can be accessed through the fields of infotypes. Infotypes have ranges specified for various submodules and modules.

The following are a list of infotype ranges:

- ► Infotype 0000-0999 Master data
- ► Infotype 1000-1999 Objects
- ▶ Infotype 2000-2999 Time Management
- ▶ Infotype 3000-3999 Materials Management

- ► Infotype 4000-4999 Recruitment
- ▶ Infotype 5000-5999 E-Recruiting/Talent Management
- ► Infotype 9000-9999 Customer-specific

As shown, object infotypes range between 1000-1999. Each of these infotypes contributes to a set of data stored in the master data tables.

In this section, we will discuss some of these infotypes in detail. We will also discuss the time constraints used in the object infotypes. Apart from this, we will also look at the different ways to maintain object infotypes. These include:

- ► Single infotype for a single object via Expert Mode
- ► Multiple objects via Individual Maintenance
- ▶ One object sequence of infotypes (multiple infotypes) via Actions

We'll then discuss each of the important object infotypes and the data that can be stored in them.

Revisiting Time Constraints

Time constraints define the importance or regulates the importance of data and can define the existence of one or multiple instances of data. There are multiple types of time constraints:

► Time constraint 1

In an infotype, when data is to be available throughout without any possibility of any time gaps in the data.

► Time constraint 2

Like time constraint 1, the data has to be available only once. However, here gaps are possible in the data.

► Time constraint 3

With time constraint 3, multiple data may exist in places. Gaps may also exist.

▶ Time constraint A

The data can only exist once between 01.01.1800 to 31.12.9999. Data cannot be split.

► Time constraint B

Like time constraint A, the data in time constraint B can also only exist once between 01.01.1800 to 31.12.9999. In addition, data cannot be split, but can be deleted.

► Time constraint T

For this time constraint, the time constraint of the infotype is dependent on the subtype.

Time constraints play a pivot role in object infotypes as they indicate how many data points can be stored and if these data point are modifiable, as well as what happens when data is delimited or deleted.

Apart from time constraints, when defining relationships (which also form the subtypes for Infotype 1001 [Relationship]) one can also specify that the time constraints are object type-dependent. This means that the existence of a relationship one or multiple times depends on the object types in question. For example, the tasks associated with a Position. In this case, the time constraints should be 3. since multiple tasks may be associated with a Position.

Now that we've gone through the different time constraints that can be used with infotypes, in the next section we'll begin looking at the tools for maintaining infotypes.

8.1.2 Infotype Maintenance

As previously discussed, object infotypes range from 1000 to 1999. The maintenance of these infotypes can happen in three different ways (see Figure 8.1):

- ► EXPERT MODE
 - For maintaining one infotype at a time per object (PP01).
- ► INDIVIDUAL MAINTENANCE
 - For maintaining one infotype for multiple objects of a particular object type (PS04).
- ► Actions

For maintaining a sequence of infotypes for one object (PP03).

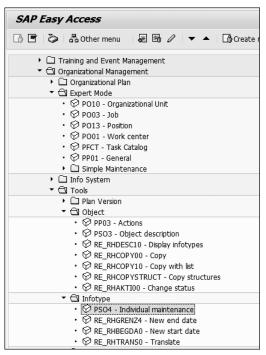


Figure 8.1 Options For Expert Mode

We will now discuss each of these types elaborately.

Expert Mode

Infotypes in the SAP ERP HCM system store relevant employee data essential for administrative purposes in an enterprise. Infotypes have a four digit code and a related name. Similar types of data are stored on the same screen. For example, Infotype 0002 (Personal Data) stores all employee personal data like first name, last name, date of birth, etc.

Data needs to be entered for every SAP infotype field. These fields can either by mandatory or optional. The infotype level determines the user authorizations needed to access the HR master data. Therefore, users are granted access to specific employee information relevant for their position, in order to maintain an appropriate level of security for sensitive personnel information.

Infotypes are also divided into *subtypes* which are different groups connected to the same subject, like permanent address or emergency address are subtypes of Infotype 0006 (Addresses).

Infotypes are maintained based on certain validity dates (i.e., start dates and end dates) which effectively maintain an employee's data history. Therefore, when an employee's data is updated the previous data is subsequently time delimited. Hence, it is possible for an employee to have many records for one infotype, with different validity periods.

Infotype 1000 (Object) forms the core of Organizational Management in SAP ERP HCM since every organizational object possesses a record of Infotype 1000 (Object). Besides a detailed explanation of Organizational Management infotypes we will also learn about the customizing activities for certain infotypes. Unlike Personnel Administration infotypes, when data has to be made available for Organizational Management infotypes they have to be activated using the Activate icon .

Individual Maintenance

When maintaining one infotype for multiple objects you use Individual Maintenance. This can be accessed via Transaction PS04.

On accessing this transaction (see Figure 8.2), you must first provide the Plan Version. Then, you must enter the Object Type. Within the Object Type one or more object types can be selected.

The SEARCH TERM field allows you to search for objects based on a specific term. For example, you can use this field if you want to search for all the Org. Units with HR as the keyword. In addition, a list of the search results are displayed from which you can select one or multiple objects. Selecting these objects will make their object IDs appear in the OBJECT ID field.

The Object Status field is used for selecting the object status for which the object infotype have to be maintained. As previously discussed, objects can occur in various statuses and the status in which the object belongs is dependent on the status of the infotype in correlation to that object.

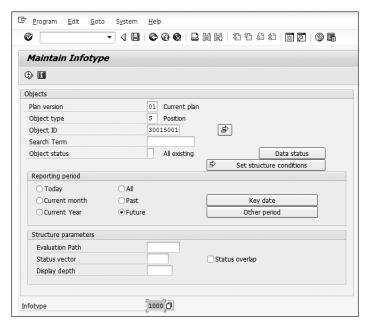


Figure 8.2 Indivudual Manintenance

Once all the fields are selected, as a further option, you can use the Set structure conditions button, which enables you to select multiple structures through relationships and evaluation paths. If selecting objects is done based on the object status in which the object data exists, you can activate the Data Status field by clicking on the Data Status button.

The REPORTING PERIOD section of the screen allows you to select the time duration within which the object infotype data is displayed. Since objects are time-dependent, the attributes in correlation to an object may vary with time. Therefore, the selection of the REPORTING PERIOD plays a crucial role.

The Structure Parameter section is used to define the structure. The three fields in this section help define the structure for which the objects have to selected. The first field is for Evaluation Path. This is used for defining the structure to be worked upon.

The next field is DISPLAY DEPTH. This field enables you to opt for the drill down level within the chosen structure. This field can hold a maximum of six characters. The STATUS VECTOR field defines the status for the objects in the chosen structure.

After entering these fields, the objects along with their infotypes are shown (see Figure 8.3). In this screen you can also use the CREATE or the EDIT icon from the application toolbar to process the infotype for the selected object. You can then post the plan version status, as shown in Figure 8.3.

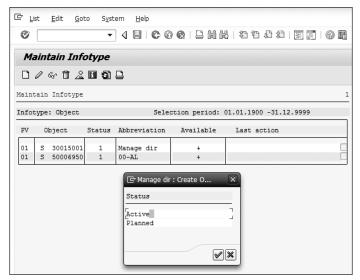


Figure 8.3 Selecting the Object for Maintainance

On the next screen (see Figure 8.4), the infotype is displayed for the newly created object.

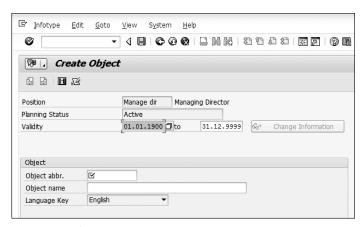


Figure 8.4 Infotype 1000 (Object)

Actions

Actions can be accessed via Transaction PPO3. Some infotypes are required for objects to exist in the system. In order to ensure that all the infotypes required for a certain object to be created are fulfilled, the infotypes need to be arranged in the Actions method. These Actions have to associate with a particular *action type*. When a certain action type is selected when creating an object under a certain object type, the infotypes required for these object types will be provided in sequence. This ensures minimal errors while creating an object.

Actions can be created in IMG on reaching the personnel actions using the path displayed in Figure 8.5: Personnel Management • Organizational Management • Basic Settings • Maintain Personnel Actions.

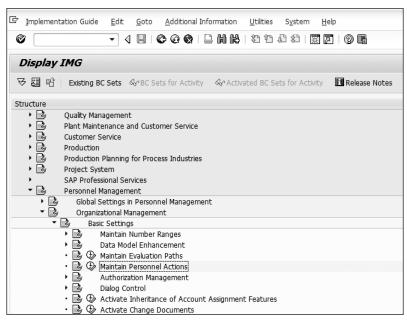


Figure 8.5 Actions Navigation

You then have to select the personnel action. On selecting the personnel action, proceed with the following steps:

1. Choose the ACTIONS (OVERVIEW) folder on the left. This where one needs to name the personnel action for objects (see Figure 8.6).

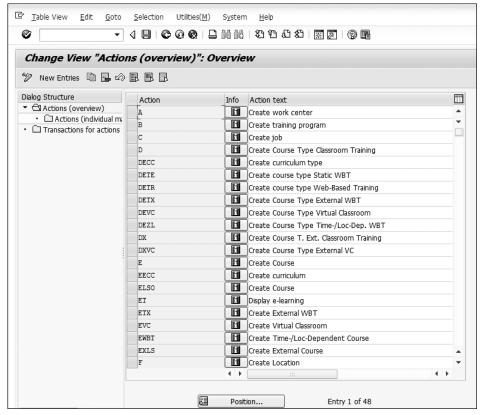


Figure 8.6 Personnel Actions

- 2. Now select the Actions (Individual Maintenance) folder under the certain action type created. List the set of infotypes that would be featured in a sequential manner for this personnel action (Transaction PP03). Transaction PP03 further defines the integration switches that should be activated for the various personnel actions to exist (see Figure 8.7). We'll discuss integration switches in greater depth in Chapter 13.
- 3. After creating the personnel actions, you can use these actions through the SAP menu to create objects, as shown in Figure 8.8.

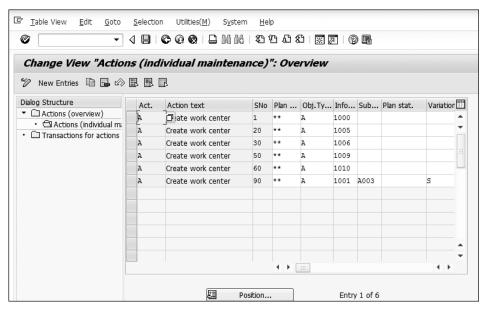


Figure 8.7 Aligning Infotypes

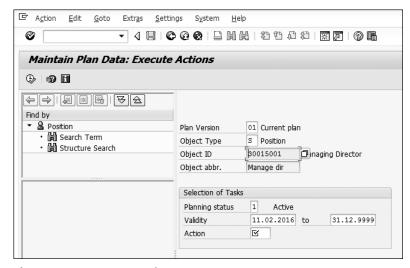


Figure 8.8 Execute Personnel Actions

Now that you understand the different methods for maintaining infotypes, in the next section we'll look at commonly used infotypes in Organizational Management and how to maintain them.

8.1.3 Commonly Used Infotypes in Organizational Management

There are 999 infotypes used throughout Organizational Management—but we'll focus on the most commonly used infotypes used for the organizational plan in Organizational Management and the processes involved in maintaining them.

Infotype 1000 Object

The organizational object is created with Infotype 1000 (Object) and is identified in the SAP ERP HCM system with an eight digit object ID number. Additional infotype information, such as attributes and relationships, can also be added to the object created. You will need to provide an object description and an abbreviation to represent the object which may be a long or a short name. However, the abbreviation should be assigned so that it is easily identifiable in the system. The name assigned is stored in the SAP system with a language key.

It is also essential to define a validity period for the object created, as shown in Figure 8.9. The validity period of Infotype 1000 (Object) restricts the validity period of any other infotype when you create a new object. You can alter the abbreviations and description later on by editing the object infotype records—but you can't change the validity period of the object created later.

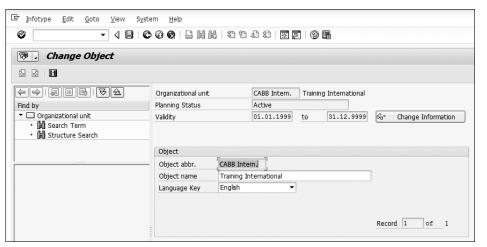


Figure 8.9 Infotype 1000 (Object)

You also have the option of deleting the objects you've created. But, this results in the deletion of all the existing records in the SAP system.

Infotype 1001 Relationships

Infotype 1001 (Relationships) defines the relationship between different objects. This aspect of creating and maintaining relationships is an essential component of Organizational Management. In an enterprise, an employee holds a position and thereby a relationship is formulated between the employee and the position. The relationship between the different Org. Units, Persons, and Positions forms the basis of organizational structure. It is not possible to form an organizational structure without relationships defined between objects.

There are many possible relationships between objects, and every relationship is a subtype or category of Infotype 1001 (Relationships). Specific relationships can be allocated to specific objects, so when you create Infotype 1001 (Relationships) records, it is essential to choose a suitable relationship for the two objects involved in the process.

An organizational structure has a set of standard predefined relationships, which can be utilized. New relationships can also be created. It is possible for the user to create and edit numerous relationship records for a single object in the SAP ERP HCM system using Infotype 1001 (shown in Figure 8.10).

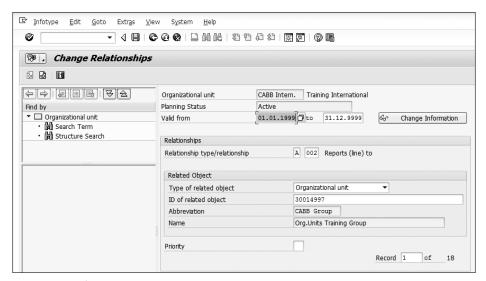


Figure 8.10 Infotype 1001 (Relationships)

Defining relationship records by related Persons and Positions in the organizational plan helps integrate Organizational Management and Personnel Administration

processes. For example, when you are initiating the reporting process, a sequence of relationships—determined as per organizational requirements—is entered into the SAP system. This sequence is known as the *evaluation path*, and it plays a predominant role in the reporting process.

More on the integration between Organizational Management and Personnel Administration can be found in Chapter 13, Section 13.2.

Infotype 1002 Description

Infotype 1002 (Description) provides the description or information about different objects that are created in Organizational Management. You can enter relevant descriptions in different languages. Numerous descriptions can also entered through the infotype subtype; subtypes help effectively categorize the infotype record that can be created. The information stored is here for reference purposes only, and cannot be used for the reporting process. The different responsibilities of an enterprise are located here and in the Work Center object type where specific rules can be specified.

A number of descriptions can be created for a single object in Infotype 1002 (Description), as shown in Figure 8.11.

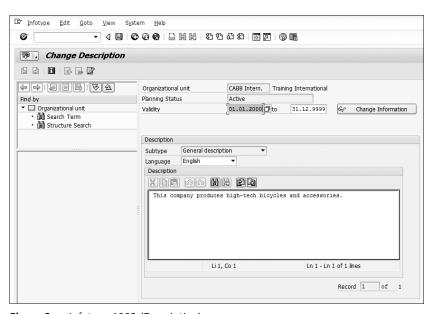


Figure 8.11 Infotype 1002 (Description)

Infotype 1003 Department/Staff

Infotype 1003 (Department/Staff) is categorically used for Org. Units and Positions in an enterprise. It is not necessary to generate this infotype as it can be effectively maintained through Infotype Maintenance by forming infotype records for each object, making it optional.

This infotype has two primary functions: indicating whether an Org. Unit and Position are STAFF or a DEPARTMENT. The STAFF checkbox indicates that a certain Org. Unit or Position reports directly to a high level Position and hence are not part of the normal reporting process in an enterprise.

When the STAFF checkbox in Figure 8.12 is selected, it is necessary to enter which Org. Unit represent departments since there is no previously assigned Positions in these Org. Unit and only the flagged data is transferred in the integration process.

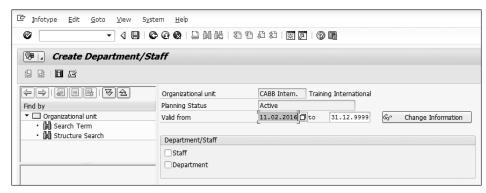


Figure 8.12 Infotype 1003 (Department/Staff)

The Department checkbox shown in Figure 8.12 is utilized when the integration process between Personnel Planning and Personnel Administration is active and a data transfer is taking place. The Department flag is maintained through the entries PPABT PPABT in the integration table T77SO in case the company utilizes it (see Figure 8.13).

The following path can be chosen under IMG to integrate between Organizational Management and Personnel Administration: Organizational Management • Integration • Integration with Personnel Administration • Set Up Integration with Personnel Administration.

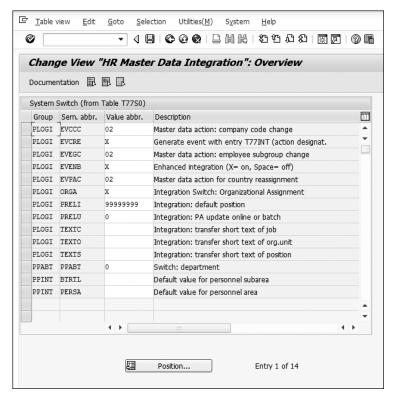


Figure 8.13 Integration Switches

Infotype 1004 Character

Infotype 1004 (Character) is used for classifying tasks. These tasks are classified in the task catalog. The categorization of tasks play an important role when assigning tasks to workflows. The tasks in the task catalog can be classified into the following groups through Infotype 1004 (Character) (see Figure 8.14):

- ► PLANNING/COMPLETION/CONTROL
- ► DECIDE/EXECUTE
- ► PURPOSE/ADMINISTRATIVE

These categories help in segregating tasks based on the nature of the given task. For example, let's say the task is projecting hiring. The following example settings may be selected:

- ► The Planning indicator under the Planning/Completion/Control section is selected.
- ► If the task has yet to be approved, then the DECIDE indicator must be checked in the DECIDE/EXECUTE section.
- ► Finally, if the task is administrative in nature, then the ADMINISTRATIVE indicator must be selected in the Purpose/ADMINISTRATIVE section.

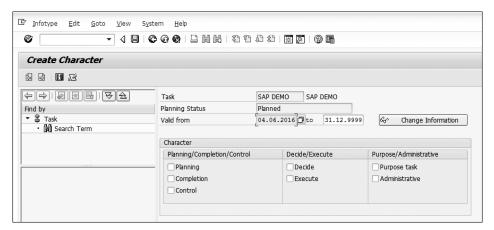


Figure 8.14 Infotype 1004 (Character)

Infotype 1006 Restrictions

Infotype 1006 (Restrictions) is used to manage special work situations which are specified to ensure that work is not assigned to employees who are not suitable for the type of work. For example, let's say a work task requires employees to be exposed to radiation. Certain medical conditions and precautions are required for workers dealing with these materials. For example, women who are pregnant may be an excluded from such work. Similarly, certain work may require working at heights. Therefore, workers who have acrophobia may be excluded in this case.

In Figure 8.15, we show the Infotype 1006 (Restrictions) screen. Here, you designate the Work Center, Planning Status, and how long the restriction is in place in the Valid from/to field. The Restrictions section then offers the specific reason for the restrictions.

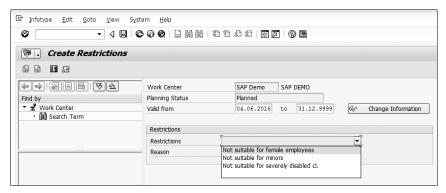


Figure 8.15 Infotype 1006 (Restrictions)

Infotype 1007 Vacancy

Infotype 1007 (Vacancy) highlights position vacancies in an enterprise, which may be current or may be in future. Infotype 1007 (Vacancy) is designed only for unoccupied positions, but it's also possible to create a vacancy record for a particular occupied position; for example, if a person goes on maternity leave, you may want to create a vacancy for an otherwise occupied position. It is not possible for the user to edit the information for a vacancy that has been filled.

The Infotype 1007 (Vacancy) record can be created for a position that is either occupied or unoccupied. An enterprise doesn't *have* to differentiate between occupied and unoccupied positions, which implies that all unoccupied positions are vacant. Accordingly, an indicator is set which will tell the system to treat all unoccupied positions as vacant.

Now, if the enterprise *does* differentiate between an occupied position and an unoccupied position, then the user should maintain Infotype 1007 (Vacancy); from then on, the system would treat all unoccupied positions as vacant. So whether you choose to utilize Infotype 1007 (Vacancy) primarily depends on how unoccupied positions are viewed.

Infotype 1007 (Vacancy) has two radio buttons shown in Figure 8.16: OPEN and VACANCY FILLED. OPEN indicates that the position is vacant and a person can be assigned with this position. VACANCY FILLED would that mean a person is already assigned and therefore the position is not vacant.

The data of the vacancy—in other words, the VALID FROM and To fields shown in Figure 8.16—is utilized by multiple HR elements. The vacancies are taken into

account when projecting personnel costs in Personnel Cost Planning, in the recruitment process in order to determine when the open positions are occupied by an internal or external candidate, and for career and succession planning to determine an appropriate future position for an employee. The application management element also checks for vacancies in an enterprise when the integration with Personnel Administration is active.

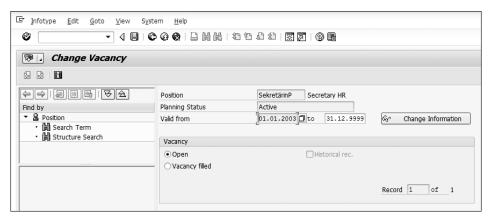


Figure 8.16 Infotype 1007 (Vacancy)

To activate or deactivate Infotype 1007 (Vacancy), respectively, follow the IMG path Organizational Management • Infotype Setting • Activate/Deactivate Vacancy Infotype. This will take you to the screen shown in Figure 8.17, where you can activate and deactivate vacancies.

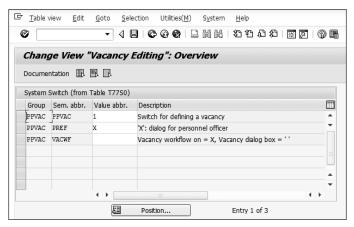


Figure 8.17 Integration Switches for Activating Vacancy

Infotype 1008 Account Assignment Features

Infotype 1008 (Account Assignment Features) portrays the account assignment features such as company code, business area, personnel area, and personnel subarea, as shown in Figure 8.18.

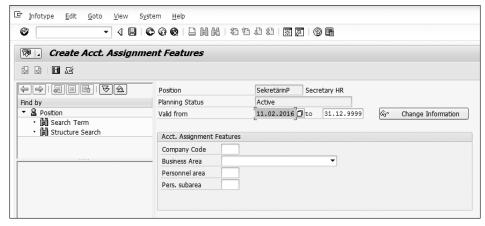


Figure 8.18 Infotype 1008 (Account Assignment Features)

Infotype 1008 (Account Assignment Features) assigns Cost Centers for both Org. Units and Positions. It assists the user to enter default setting for the cost center, which is helpful in Personnel Administration. The infotype can be maintained through Infotype Maintenance or through the more-structured Simple Maintenance. The Cost Center associated default setting specified in this infotype determines the appropriate Cost Center allocation for an object with the help of the inheritance principle.

The amalgamation of types of information like company codes, business area, and the default settings for these determines and streamlines the number of Cost Centers that can be allocated. This also ensures that any person allocated to the positions in an enterprise is allotted the same Cost Center, thereby reducing any possible data errors in the system. The default settings for all the Org. Unit can be entered through Customizing in cases where the user does not want to set defaults by using Infotype 1008 (Account Assignment Features).

Now, in the case of the Personnel Administration default settings, Infotype 1008 (Account Assignment Features) helps in allocating personnel areas to Org. Units and Positions. This also eliminates any possibility of data entry errors and also

ensures easier and faster allocation of the personnel area since it doesn't need to be done individually.

The inheritance principle applies to personnel areas, implying that personnel areas, unless specified, are automatically inherited and allocated to Org. Units and Positions. In Personnel Administration, Infotype 0001 (Organizational Assignment) is defaulted by its cost center fields and personnel structure (see Figure 8.19).

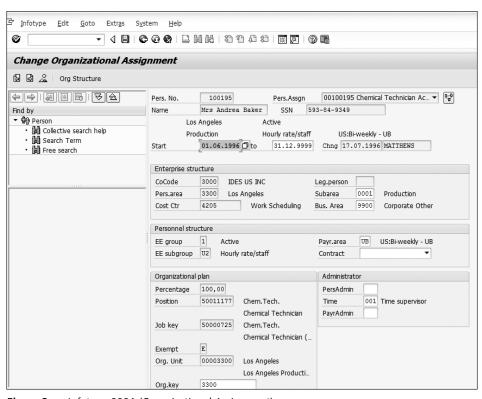


Figure 8.19 Infotype 0001 (Organizational Assignment)

There are two integration settings to access the customizing table for Infotype 1008 (Account Assignment Features), which the user should apply in Customizing:

▶ PPOMINHS

To access the first customizing table, follow the IMG path: Organizational Management • Basic Settings • Activate Inheritance Of Account Assignment Feature. This setting does not affect the cost center allocation, which is automatically inherited by the general settings of the integration process. The entry in the Value ABBR. field in Figure 8.12 must be set to X by the user for the personnel area and personnel sub area to be automatically inherited to Personnel Administration (see Figure 8.20)

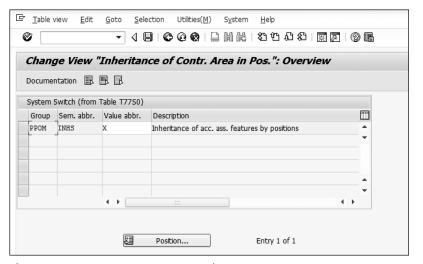


Figure 8.20 PPOMINHS Integration Switch

► PPINTPPINT

In order to access the second customizing table the following path must be selected through IMG: Organizational Management • Integration • Integration With Personnel Administration • Set Up Integration With Cost Accounting. This entry in the SAP system describes the default controlling area that streamlines the cost center search and selection in Infotype 1008 (Account Assignment Features). However, this field can be left blank if the enterprise uses multiple controlling areas.

The customizing settings in table 77750 are required when numerous company codes or controlling areas are set in the system (see Figure 8.21). This customizing setting affects the account assignment infotype and can be accessed through Transaction SM30.

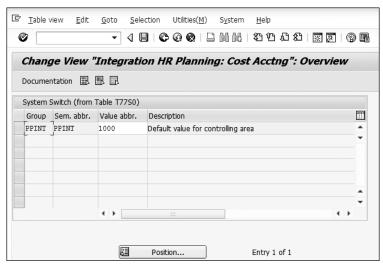


Figure 8.21 PPINTPPINT Integration Switch

The integration switches PPOMINHIC and PPOMINHIH allow for data entry in the Customizing settings of the SAP ERP HCM system. PPOMINHIC depicts this entry as X to eradicate the possible inheritance of the company code from cost center, and PPOMINHIH depicts this entry as X to eradicate the possible inheritance of controlling area from cost center in the system.

Thus, the integration of Personnel Administration and Infotype 1008 (Account Assignment Features) helps to eradicate data entry errors, and streamlines the integration process between Personnel Administration and Organizational Management. It also keeps the data up to date effortlessly—which is of primary importance in big enterprises.

Infotype 1013 Employee Group/Subgroup

Infotype 1013 (Employee Group/Subgroup) is optional and allocates the employee group and subgroup to a Position. It is created only for that Positions object type, as shown in Figure 8.22.

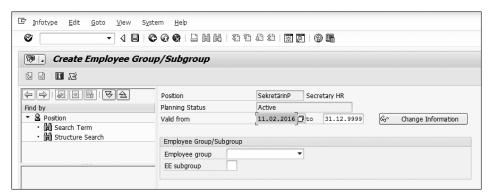


Figure 8.22 Infotype 1013 (Employee Group/Subgroup)

It is possible for a user to check the employee and Position in this infotype for both Organizational Management and Personnel Administration. The employee group and subgroup must be present in both the elements to execute this check effectively. The SAP ERP HCM system confirms that the personnel is allocated to a Position and that the Position itself is also allocated to same employee group and subgroup. The system also confirms that the work schedules assigned to both the Position and employee group and subgroup in Organizational Management are coherent with working times allocated to the Holder in Personnel Administration. If the system identifies any kind of inconsistency, then a warning message is displayed on the screen, but it will still perform activities.

When the integration process is active, the system checks the employee group and subgroup while working with the work schedule. The employee group and subgroup are also used with Infotype 1011 (Work Schedule) which can be maintained in the SAP ERP HCM system through Infotype Maintenance by creating an infotype record for each object one at a time, or through Simple Maintenance.

Infotype 1018 Cost Distribution

The process by which costs can be distributed to numerous Cost Centers in an enterprise is determined by Infotype 1018 (Cost Distribution), which is shown in Figure 8.23. It works in coordination with the Infotype 1008 (Account Assignment Features).

The Cost Center, which is directly allocated to an Org. Unit, determines the cost that is incurred by the organizational object. It is assigned to the Cost Center that has been inherited by the object from a higher object and the master cost center is determined in Infotype 1001 (Relationships).

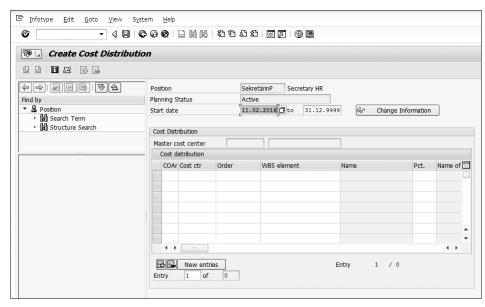


Figure 8.23 Infotype 1018 (Cost Distribution)

If it is necessary within an organization to distribute costs to multiple Cost Centers then a record should be created for Infotype 1018 (Cost Distribution). This provides users with the option to select which section of the costs will be distributed to which Cost Center. If subordinate organizational objects, like Work Center and Position, have not allocated their own master cost center or cost distribution, then they will inherit the cost distribution automatically.

When the user creates a cost distribution infotype record and the system subsequently creates a relationship infotype record and cost distribution between objects an entire record of Infotype 1018 (Cost Distribution) incorporates a proper categorization of every Cost Center to which costs are to be distributed and is not a master cost center.

Infotype 1018 (Cost Distribution) can be created for Org. Units, Positions, and Work Centers. It can be used in components like Personnel Cost Planning and

payroll and accounting. The user must adhere to the following IMG customization setting when working with Infotype 1018: Organizational Management • Integration • Integration with Personnel Administration • Set Up Integration for Cost Distribution. This menu path will take you to the screen shown in Figure 8.24.

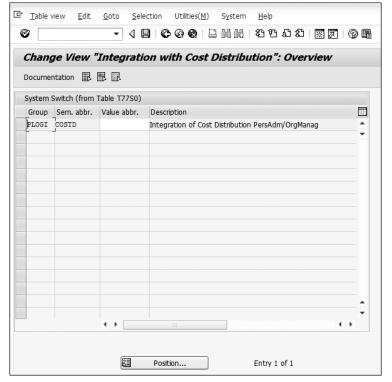


Figure 8.24 Cost Distribution Integration

Cost distribution for employees can also be depicted in Personnel Administration Infotype 0027 (Cost Distribution), which is shown in Figure 8.25. To assign cost elements, such as a WBS element or Cost Center, for distribution purposes used in accounting, follow the menu path: Human Resources • Personnel Management • Personnel Administration • Maintaining HR Master Data • HR Master Data Structure • Infotypes of Personnel Administration and International Payroll • Organizational Data • Cost Distribution.

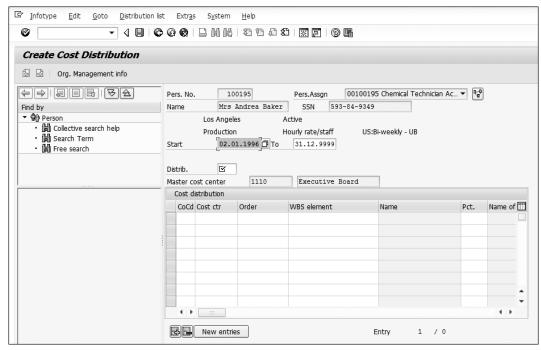


Figure 8.25 Infotype 0027 (Cost Distribution)

If the integration is set up between Organizational Management and Personnel Administration (integration switch PLOGI ORGA), and if the integration of cost distribution (integration switch PLOGI COSTD) has been initiated in Customizing, and if Infotype 0027 (Cost Distribution) stores a valid record, then costs will be handled as per *this* cost distribution (Infotype 0027); otherwise the costs will be distributed as per the record for Infotype 1018.

Infotype 1028 Addresses

As you can see in Figure 8.26, Infotype 1028 (Addresses) is used to store addresses of companies or external participants. Infotype 1028 (Addresses) also stores information on the location of organizational objects and resources. This infotype is maintained for Positions, Org. Units, and Work Centers. This infotype is optional and is for reference purpose only

Infotype 1028 (Addresses) is also used for the Training and Event Management component and is maintained for external participants and trainers, business

event locations companies, and room resources. This infotype is used in correspondence for confirmation of attendance, confirmation of registration, and is maintained at business event location.

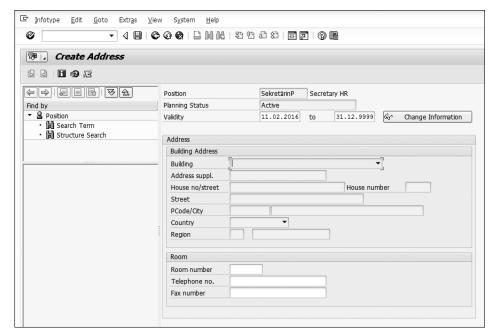


Figure 8.26 Infotype 1028 (Addresses)

You must create Infotype 1028 (Addresses) for instructors as well as external participants. This infotype offers an advantage when setting up various kinds of addresses in the SAP ERP HCM system. You should enter the necessary data like the building name and room number to provide specific location information, in addition to information such as the house number, street, address affix, telephone, fax, and region.

The subtype of this infotype allows you to store different addresses in the system, such as first and second addresses.

There are two customizing tables necessary when using preset building information. To access this customization, follow the menu path Personnel Management • Organizational Management • Infotype Settings • Set Up Check Values for Building. As shown in Figure 8.27, we can enter building address values in the Building column.

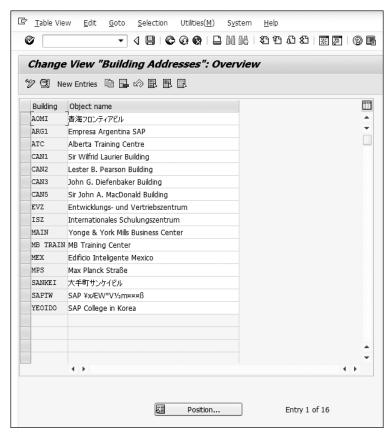


Figure 8.27 Configuring Building Dropdown

The other customizing table is the infotype per object type view.

You create this infotype in the current settings or in Customizing by selecting Create Room, Create External Instructor, Create Location, or Create Company. It is necessary for the user to go through steps in Customizing (for example, to set up building addresses) in the current settings for Training and Event Management before maintaining building addresses with location information for rooms.

Infotype 1208 SAP Organizational Object

Infotype 1208 (SAP Organizational Object) allows you to create and maintain relationships between organizational objects for Positions, Jobs, Org. Unit, and Work Centers (see Figure 8.28).

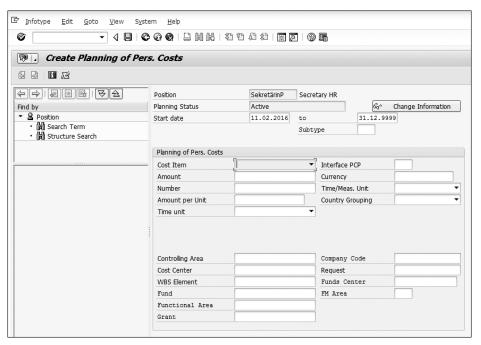


Figure 8.28 Infotype 1208 (SAP Organizational Object)

The relationships between these organizational objects are relevant specifically for SAP Business Workflow users who are using rules to recognize steps in a particular workflow. This type of allocation can be used by using Infotype 1208 (SAP Organizational Object) in Infotype Maintenance in Organizational Management.

Infotype 1222 General Attributes Maintenance

Infotype 1222 (General Attributes Maintenance) allows you to store as much data as possible in Organizational Management objects as per your requirements. This data is stored in the systems generically in the form of key values or value ranges, as shown in Figure 8.29.

This data is a user-defined infotype and can also be divided by using infotype subtypes. There's no IMG path available to access the customizing settings required for Infotype 1222 (General Attributes Maintenance). Instead, use Transaction OOATTRCUST to carry out customizing activities. Transaction OOATTRCUST is the view for the customizing table T770MATTR (see Figure 8.30). From this table you can deduce four customizing activities.

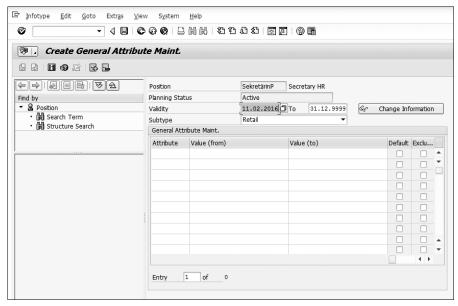


Figure 8.29 Infotype 1222 (General Attributes Maintenance)

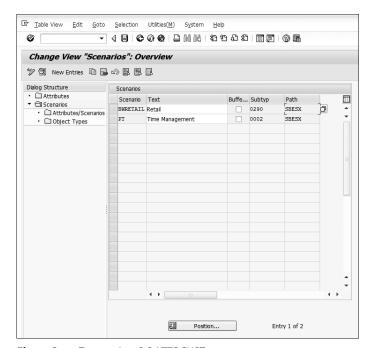


Figure 8.30 Transaction OOATTRCUST

The SCENARIOS folder is used to create the infotype attribute, which are defined by specific characteristics, and are assigned an up to ten-character code and a long text description and is defined by a link to a table in the ABAP Data Dictionary. It may also be referred to an organizational object as in the SAP Business Workflow object repository.

When the user chooses a table and a field combination, there is an inherent check table whose values for that particular field are used during the general attribute field assignment. After the user creates the attributes, it must be assigned to a scenario in the infotype that is equivalent to the infotype subtype. The attributes can be segregated into as many scenarios according to requirement but at least one scenario should be defined for the infotype in the SAP ERP HCM system.

Once the scenario has been created, the user must associate it with the scenarios so that they can be assigned in the infotype. There are two views for this: once in which the user allocates the attributes to the scenario and defines the process by which the attribute is to be inherited along the evaluation path, and another in which the user must denote the object types which can be assigned the attributes in every scenario.

Now that we've gone through the most commonly-used infotypes, let's look at some of the mandatory infotypes that should be used with every object, object-specific infotypes, and country-specific infotypes.

8.1.4 Mandatory Infotypes for Every Object

Infotypes are object type-specific. Object types have to be listed against every infotype that should exist for them. SAP-delivered object types are already preconfigured for this purpose. However, mandatory infotypes can still be modified in IMG.

Further, when assigning these objects one can also select the NO MAINTENANCE indicator (see Figure 8.31). Activating this checkbox suggests that the infotype for the specific object type cannot be maintained through standard transactions.

Figure 8.31 No Maintenance Checkbox

The following are mandatory infotypes for objects in Organizational Management:

► Infotype 1000 Object

Infotype 1000 (Object) is valid for all the objects, since this defines the object short and long text names.

► Infotype 1001 Relationship

For objects to exist within the organizational structure, they must be associated to other objects via relationships. This means that Infotype 1001 (Relationships) is mandatory for all object types.

► Infotype 1002 Description

Infotype 1002 (Description) specifies the various kinds of descriptions pertaining to an object. This infotype has subtypes, and every subtype has choice of languages that are associated. These subtypes are used for mentioning any special information or documentation purposes. This is made available for all of the objects as delivered by SAP.

Object-Specific Infotypes

Object-specific infotypes refer to infotypes that only exist for a certain object type. For example, recall that Infotype 1013 (Employee Group/Subgroup) only exists for the Position object type.

The following infotypes are object-specific:

► Infotype 1003 Department/Staff

Infotype 1003 (Department/Staff) is valid for the object types Org. Unit and Position.

► Infotype 1004 Character

This infotype is valid for the object type Task.

► Infotype 1006 Restrictions

This infotype is valid for object types Work Center, Budget Structure Element, Job, and Position.

► Infotype 1007 Vacancy

The vacancy infotype is valid only for the Position object type.

► Infotype 1008 Account Assignment Features

This infotype is valid only for the Org. Unit and Position object types.

► Infotype 1009 Health Examinations

The Health Examinations infotype is valid for the Work Center object type. Infotype 1009 (Health Examinations) helps in identifying the health exams available for a Work Center. Further, there are two subtypes: *health exclusions* and regularly required health exams. Whereas health exclusions define the health or fitness level one has to attain in order to work in a Work Center, the regularly required health exams define the recurring exams one has to clear and certify from time to time.

As shown in Figure 8.32, on the Create Health Examinations screen, there is a field for maintaining the different health examinations.

► Infotype 1010 Authorities/Resources

The Authorities/Resources infotype only exists for the Work Center and Position object types. Through Infotype 1010 (Authorities/Resources) the various disciplinary or level of authority that a group of employees may hold are specified.

As shown in Figure 8.33, on the Create Authorities/Resources screen, you can indicate the different authorities an employee holds.

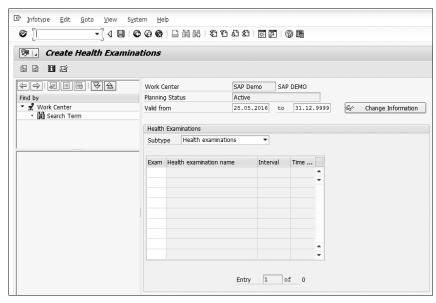


Figure 8.32 Health Examinations Infotype

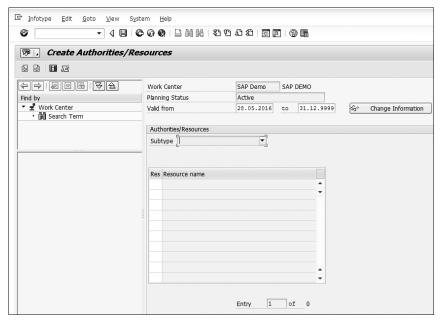


Figure 8.33 Authorities/Resources Infotype

► Infotype 1011 Work Schedule

The Work Schedule infotype is available for the Work Center, Org. Unit, and Position object types. Recall from Chapter 7 that Infotype 1011 (Work Schedule) compares the working times as assigned to a Position with the working times stored in Infotype 0007 (Planned Work Time).

► Infotype 1013 Employee Group/Subgroup

The Employee Group/Subgroup infotype is valid for the Work Center, Budget Structure Element, Job, and Position object types.

► Infotype 1014 Obsolete

The Obsolete infotype can exist only for Work Center and Position object types. Infotype 1014 (Obsolete) refers to those objects no longer active in the system. Objects like these cannot have a holder, meaning a person cannot hold an obsolete position. This is the reason that at any given time either vacancy or obsolete infotypes can exist for an object. Figure 8.34 shows the CREATE OBSO-LETE screen where the Obsolete checkbox can be chosen.

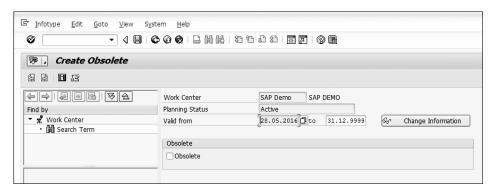


Figure 8.34 Obsolete Infotype

► Infotype 1015 Cost Planning

The Cost Planning infotype shown in Figure 8.35 is applicable for the Work Center, Job, Org. Unit, and Position object types. Infotype 1015 (Cost Planning) helps segregate costs based on wage elements. Though this the allocation of wages, valuation type direct or indirect, currency for the wages, amount of wages, and percentages can be maintained for the Work Center, Job, Org. Unit, and Position object types.

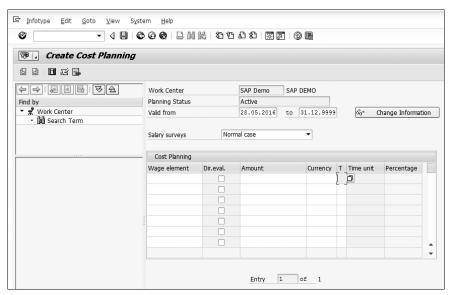


Figure 8.35 Cost Planning Infotype

► Infotype 1016 Standard Profiles

The Standard Profiles infotype shown in Figure 8.36 is available for the Job, Org. Unit, Responsibility, Position, Task, and Task Groups object types. Infotype 1016 (Standard Profiles) helps in allocating the authorization profiles per object to define which kind of object will have what level of access. Here, we are searching profiles that are already created; we can sort the type of profile using Version and Type.

VERSION options are limited to ACTIVE ONLY or MAINTAINED ONLY checkboxes; whereas the Type options describe if it is a single profile or a composite profile. A composite profile indicates multiple single profiles being selected.

► Infotype 1017 PD Profiles

This infotype is used for the object types Job, Org. Unit, Responsibility, Position, Task, and Task Group. The assignment of Personnel Development profiles is done through Infotype 1017 (PD Profiles). The profiles are different from the general authorization profiles since they correlate to the Personnel Development object types.

► Infotype 1018 Cost Distribution

Cost Distribution infotypes are available for Work Center, Org. Unit, and Position.

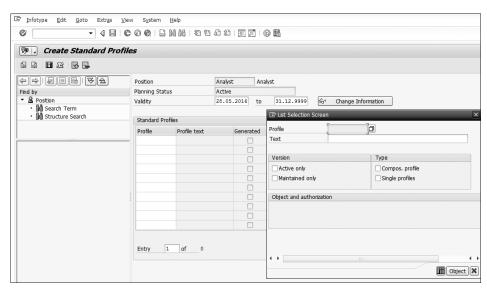


Figure 8.36 Standard Profiles Infotype

► Infotype 1027 Site-Dependent Information

Infotype 1027 (Site-Dependent Information) is available for the object types Location and Org. Unit.

8.1.6 Country-Specific Infotypes

Country-specific infotypes are applicable only for certain countries. In a standard SAP ERP HCM system, these infotypes appear automatically in Personnel Administration when a certain country grouping is selected.

As shown in Figure 8.37, in Organizational Management, the country-specific infotypes have a Country Specific column which can be set against a certain infotype for a specific country via the following menu path: Personnel Management • Organizational Management • Data Model Enhancement • Infotype Maintenance • Maintain Country Specific Infotype.

On the CHANGE VIEW "COUNTRY-SPECIFIC INFOTYPES": OVERVIEW screen shown in Figure 8.37, you can select an infotype (IT column) from the dropdown and choose which two-character country code to associate with it. This tells the user that the infotype is specific to that country (see Figure 8.38).

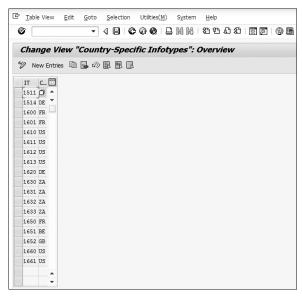


Figure 8.37 Country Specific Infotype Indicator

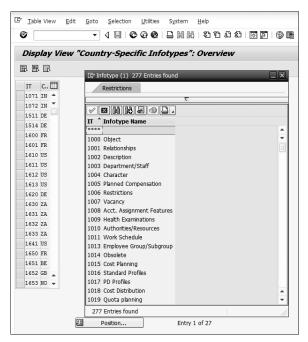


Figure 8.38 Choosing a Country-Specific Infotype

Once you've defined these infotypes based on their country, you can access the country-specific infotypes through the SAP menu by navigating to Expert Mode. In the menu bar, select Setting • Country-specific infotypes.... On selecting this option, the Country-Specific infotypes screen appears where you can select whether there are No country-specific infotypes, All country-specific infotypes, or For the following countries for objects. With the third option, the new Country Key pop-up will appear where you can select a certain country (see Figure 8.39).

Once selecting one of these options these infotypes will now be displayed in the infotype menu and be available for further maintenance. The availability of the infotype is also dependent on the object type in question.

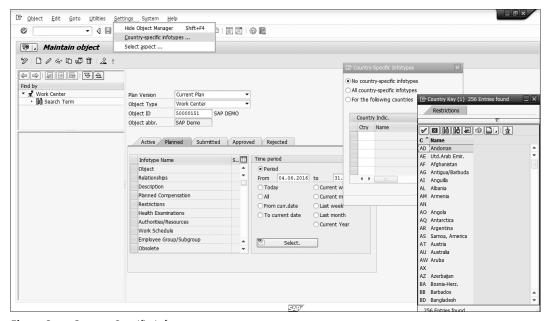


Figure 8.39 Country-Specific Infotypes

Infotype 1610 US EEO/AAP Information

In this infotype you can specify the Equal Employment Opportunity (EEO) grouping, the Affirmative Action Plan (AAP) grouping, the Fair Labor Standards Act (FLSA) indicator for regulatory reporting, and the Occupational Classification

Category (OCC). Infotype 1610 (US EEO/AAP Information) permits the user to maintain legally required data for jobs within US organizations.

Infotypes 1612 and 1613 Workers Compensation Codes

Worker's compensation code information for US organizations are stored in Infotypes 1612 and 1613. In SAP system, Infotype 1612 stores information of Org. Units and Infotype 1613 stores information for Positions. In both of these infotypes, there are fields to enter the worker's compensation state as well as the code.

In this section, we looked at commonly-used, mandatory, object-specific, and country-specific infotypes. In the next section, we'll take a close look at Expert Mode as a whole, and look at the various tools it provides for objects and infotypes.

8.2 The Screens and Associated Fields

When working in Expert Mode you need to first select the object type to be created or maintained. Some of the SAP-delivered object types can be accessed directly, including the following:

- ► Org. Unit
- ▶ Job
- ► Position
- ▶ Work Center
- ► Task Catalog

Transaction PP01 (Maintain Plan Data [Menu Guided]) lists all the object types possible or configured within the system. Since this transaction enables you to work upon all objects, it's important to select the object type first, unlike transactions that are object type-specific.

After going to Transaction PP01, select the plan version and then the object type, as shown in Figure 8.40. If you need to maintain an existing object then the OBJECT ID needs to be selected.

After providing your selection, you can view the existing infotypes that are highlighted by a green checkmark. Only infotypes marked with a green checkmark can be edited, deleted, or delimited. Infotypes that do not have a green checkmark are not existent for the selected object, and therefore need to be created.

After selecting the plan version and the object type you can leave the OBJECT ID field blank since the OBJECT ID field will hold the unique object code that will be generated once Infotype 1000 (Object) is created.

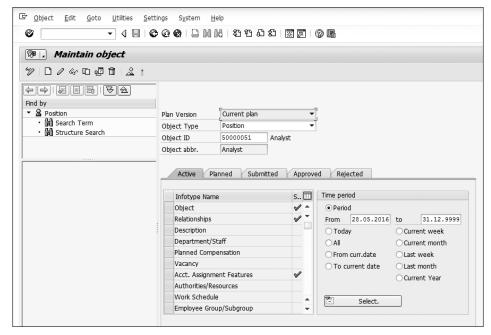


Figure 8.40 Maintain Objects in Expert Mode

In the following two subsection we look at the tools for objects and infotypes provided in Expert Mode.

8.2.1 Object Tools

Expert Mode provides various options for maintaining objects. Because these options help in operating objects, the infotypes related to these objects are also automatically affected. For example, if a user needs to create a new object that

should be identical to an existing object, the new objects infotypes should contain the same data as the existing object's infotypes.

To create a new object that is identical to another existing object, first, select the object to be copied; as shown in Figure 8.41, we've chosen object 30014999. After selecting the Copy option the system now provides an option to choose the object to which all the infotype records for the existing objects are to be copied. Under the Target Object section, you can specify the Name for the new object to be created and the Abbreviation. Further, by selecting the Copy relationships also indicator you can specify if the records from Infotype 1001 (Relationships) also needs to be copied. This is marked separately since the relationships signify the position of an object along with structure. Similarly, you can use Delimit and Delete Objects options for carrying out correlated activities.

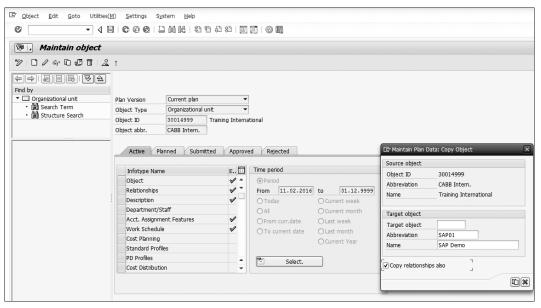


Figure 8.41 Selecting Object For Copy

After selecting these settings, you can see all the infotypes that have been copied (see Figure 8.42).

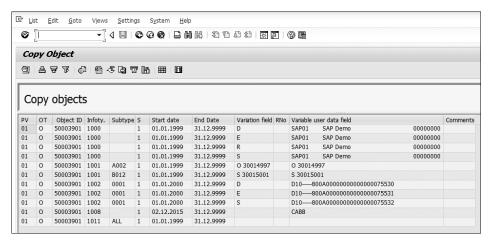


Figure 8.42 Copied Infotypes

8.2.2 Infotype Tools

While maintaining infotypes, Expert Mode provides options that can be used for selecting objects. For instance, while a relationship has to be drawn with another object, you can select the EXTRAS option after selecting an infotype to pull up objects by category (EXISTING OBJECTS, UNRELATED OBJECTS, and ALLOWED RELATIONSHIPS, as shown in Figure 8.43).

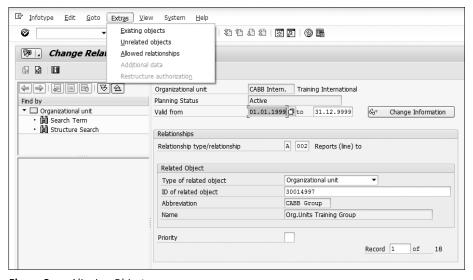


Figure 8.43 Aligning Objects

Similarly, the internal information of an object can also be accessed from the Goto option of the menu bar (see Figure 8.44).

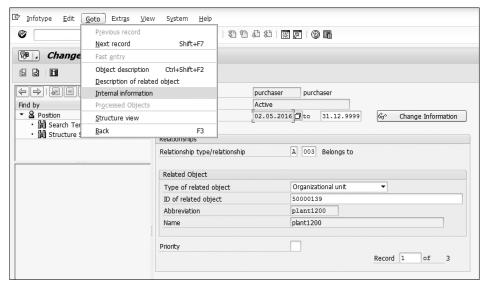


Figure 8.44 Internal Information

8.3 Maintaining Objects and Infotypes

To maintain objects in Expert Mode it is important to first categorize objects based on object type because you can directly access certain object types in Expert Mode. Maintaining these objects happens through maintaining their infotypes, as this is where object data and attributes are located.

In this section, we'll look at how to edit, search, and create objects and infotypes.

8.3.1 Editing Infotypes

To maintain infotypes in Expert Mode, you need to select the object and then select the EDIT option in the menu bar, as shown in Figure 8.45. This provides all the options required to maintain infotypes.

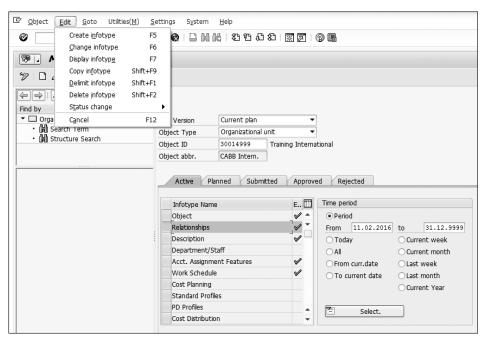


Figure 8.45 Infotype Options

The EDIT option dropdown contains the following options:

► CREATE INFOTYPE

This option enables you to create a new infotype, and is only available if the infotype exists for the selected object type. If an infotype does not already exist for the object in question the CREATE option will not be available.

► CHANGE INFOTYPE

This option is available for existing objects for which an infotype is already available. This is the primary option for updating infotypes.

► DISPLAY INFOTYPE

This option *displays* existing infotypes—but doesn't allow you to edit them.

► COPY INFOTYPE

You can make a copy of an infotype if that infotype can exist in more than one instance in accordance with its time constraint.

► DELIMIT INFOTYPE

The Delimit Infotype function is used for entering data into an infotype to

make it valid for a certain period of time. After this time has passed, the data in the infotype will no longer be active, and instead will be stored in the master data record.

► DELETE INFOTYPE

With this option, you delete an infotype without storing its record in the master data, thus deleting it permanently from the system.

► STATUS CHANGE

This option allows you to change an infotype's status. The following are the different statuses available for infotypes:

- ► ACTIVE
- PLANNED
- ► APPROVED
- ► REJECTED
- ▶ SUBMITTED

Now that you understand the options available for editing infotypes, the following subsections look at how the Expert Mode tool can be used to search, align, and create objects.

8.3.2 Searching for Objects

Objects that are already created can be searched multiple ways in Expert Mode using the Object Manager and object ID search. The available search options depend upon the object type in question.

When accessing an object type directly through object-specific transactions, like Transaction PO10 for Org. Units or Transaction PO03 for Job, the Object Manager shows only that specific object type.

However, when accessing Transaction PPO1 (Maintain Plan Data [Menu Guided]) for all objects, the Object Manager search changes based on the object type selected, just like when an object ID search has to be performed and the types of searches available are dependent on the object type. For instance, when we try to search for object IDs based on object type, then the STRUCTURE SEARCH option shown on the left in Figure 8.46 is possible. Whereas when an object like Plant is in question, the SEARCH TERM option is the only one available.



Figure 8.46 Searching Objects

8.3.3 Creating Objects

While creating objects in Expert Mode, you have to define the object type under which the object has to be created. Once the object type is selected, keep the OBJECT ID field blank. Once Infotype 1000 (Object) is created, the OBJECT ID is automatically created. The subsequent infotypes have to be filled up. Because infotypes are object type-dependent, all mandatory infotypes must be in place before an object can be created.

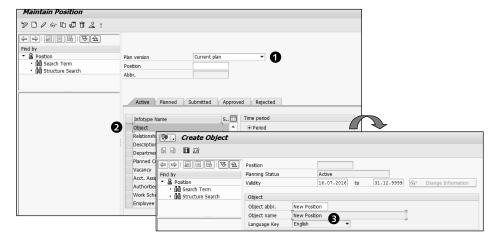


Figure 8.47 Creating Objects in Expert Mode

The process of creating an object is further explained by the following steps (see Figure 8.47):

- Keep the Position ID field blank.
- **2** Select the object Infotype and click the CREATE button.
- 3 In the next screen, enter the abbreviation and object name for the position.

8.4 Summary

Infotypes are the comprehensive structure to all HR attributes and are used to maintain HR master data in the SAP ERP HCM system. This structure is flexible and can be adjusted to suit various customers as per company requirements. Infotypes help in maintaining employee data that is often time-sensitive and has fields that are classified as mandatory or optional. Expert Mode is also capable of conveniently retrieving HR information along with performing the necessary consistency checks by auto checking the entries with preset values and specific conditions.

In this chapter, we looked at the most prominent infotypes found in Organizational Management. We revisited the use of time constraints in infotypes and looked at the different tools used for infotype maintenance. In the last two sections, we discussed the tools available in Expert Mode for maintaining objects and infotypes.

In the next chapter, we will discuss how objects from two different structures can be linked to each other through a matrix.

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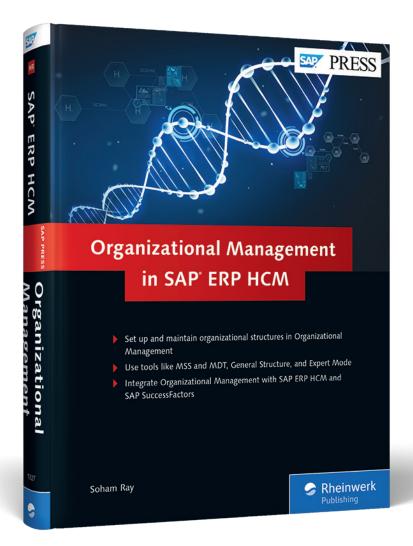
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