

Case Study Human Capital Management (HCM) – Lecturer Notes

This document is intended to help instructors understand the case study process and manage the learning process in and outside the classroom. The main focus lies on prerequisites and common tasks such as testing.

Product

SAP ERP
G.B.I.
Release 6.07

Level

Instructor

Focus

Human Capital Management

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MOTIVATION

Theoretical lectures explain concepts, principles, and theories through reading and discussion. They therefore enable students to acquire knowledge and gain theoretical insights. In contrast, case studies allow them to develop their abilities to analyze enterprise problems, learn and develop possible solutions, and make sound decisions.

The main objective of the GBI case studies in general is for students to understand the concept of integration. This descriptive and explanatory case study will allow students to understand the importance and the advantages of integrating enterprise areas using an ERP system.

The main goal of this document is to support instructors to carry out the case study. Therefore, these notes offer prerequisites for the application in education, relevant transactions for testing and correcting as well as common problems, including their reasons and solutions.

Prerequisites

Note Before using this case study in your classroom, please make sure that all technical (month-end closing, user management etc.) and didactic prerequisites are fulfilled. Such prerequisites are briefly pointed out below. Detailed documentation can be displayed at and downloaded from the *SAP University Alliances Community (UAC) portal* or the *UCC web sites*.

Technical Prerequisites

Basically, the case study is based on the system environment of a standard SAP ERP client with the current GBI dataset. Before processing the case study on your own or with your students, the general setting should be checked.

This includes **month-end closing** (transaction **MMPV**) which can be downloaded from the UCC web sites.

Month-end closing
MMPV

Note: With the current version of the GBI client, a **year-end closing** is not necessary because it has already been automated or because it is not needed for the process described in the curriculum material.

Year-end closing

User accounts in the SAP system need to be created or unlocked.

User management

These student user accounts should end with a three-digit numeric number (e.g. GBI-001, GBI-002 etc.). This number will be represented by ### in the case study and helps differentiate customer accounts, products etc.

In an SAP ERP GBI client already exist 1000 user accounts from **GBI-000** to **GBI-999**. These users need to be unlocked. The initial password for each GBI-### account is set to **gbiinit**.

GBI-000 to GBI-999

gbiinit

Transaction **ZUSR** was developed in the GBI client in order to mass maintain SAP user accounts. For a detailed description of this and SAP standard transactions for user management (SU01 and SU10), please refer to the *lecturer notes „SAP User Management“* (see → UAC → current GBI curriculum → chapter 3 – Introduction to Global Bike).

ZUSR

SU01
SU10

All GBI-### user accounts have been assigned to the role **Z_GBI_SCC_US** and have authorizations to use all applicative transactions in the SAP ERP system. The role allows access to all transactions necessary for GBI exercises and case studies. If you need access to system-critical transactions, i.e. for development purposes, you may assign the composite profile **SAP_ALL** to your student accounts.

Guidelines on how to maintain roles and profiles can be found in the *lecturer notes „SAP User Management“* (see → UAC → current GBI curriculum → chapter 3 – Introduction to Global Bike).

It is useful for the instructor to have a user account available for testing that has the same authorizations as the student accounts. You may use the predefined **instructor account GBI-000** for this purpose.

Instructor account
GBI-000

Didactic Prerequisites

In order to successfully process this case study, students should be familiar with the **navigation** in SAP systems, especially the SAP Easy Access menu, the SAP transaction concept as well as possible documentation and help options. We highly recommend using the *navigation slides* and the *navigation course* (see → UAC → current GBI curriculum → chapter 2 – Navigation).

Navigation

In addition, it has been proven beneficial that students have a thorough understanding of the **historic background** and the enterprise structure of the Global Bike concern before they start working on the SAP system. For this purpose, we recommend the *case study „Global Bike Inc.“* (see → UAC → current GBI curriculum → chapter 3 – Introduction to Global Bike) or the *case study „Business Process Analysis 1“* (see → UAC → current GBI curriculum → chapter 3 – Introduction to Global Bike).

Historic background

Since the HCM case study is not based on the exercises, it is not necessary to have processed the HCM exercises before you start with the case study. However, it is recommended.

In order to function properly this case study needs a **GBI client version** that is equal to or higher than the case study version (see cover page). Please check. If you do not know the client version please use the transaction **ZGBIVERSION** within your SAP ERP system or contact your UCC team.

GBI client version

Global Feedback

Do you have any suggestions or feedback about GBI? Please send it to our new email-address **gbi@ucc.ovgu.de** which is used to gather feedback globally. All emails will be evaluated by the persons responsible for the curriculum bi-weekly. This way your feedback might influence future releases directly.

Please note that any support requests send to this email-address will be ignored. Please keep using the common support channels for your support requests.



 Student Assessment

Note With the transactions listed below you can check and correct master and transactional data that your students have created during your course.

Master Data

PPOME	Organization and Staffing Change
PPOSE	Organization and Staffing Display
OOQ4	Career Maintenance
PPPM	Change Profile

PA30 Maintain Human Resources Master Data
PB30 Maintain Applicant Master Data
APPCHANGE Edit Appraisals

Transactional Data

PBAW Maintain Advertisements
PSV1 Dynamic Attendance Menu
PSV2 Dynamic Business Event Menu



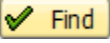
Success monitoring: Check Organization and Staffing

Note Due to the following transaction, you can check whether the participants have successfully completed the case study.

Organization and Staffing Display

Use the transaction code **PPOSE** in order to display organization and staffing.

PPOSE


In the screen Find by, expand the Organizational Unit. Choose Search Term and enter **Administration** into the field With name. Confirm your entry with .

Administration

In the Hit List, please choose the **Administration** of Global Bike US (2nd hit from above).

Administration

Hit list	
Existence	Name
	Administration and Financials
	Administration
	Administration and Financials
	Administration

Now you can see a list of all ### Security Organization units. Highlight **Administration** in the Staff Assignment and expand all organizational units by clicking .

Highlight Administration

One participant completed the case study, if the position *### Security Manager* is filled and the position *### Security Guard* is not filled anymore.



Problem: Unable to create a Career

Problem One participant is not able to create a career.

Cause Internal error of the system.

Solution Create the career again. Log in the participant again as the circumstances require.


Career Maintenance

Use the transaction code **OOQ4** in order to go to *Career Maintenance*.

OOQ4

Choose the corresponding career and click on .



Object ID	Object name	Name
50001081	000 Security Guard	

Create as shown in case study the career in graphical editor.

In case the problem was not fixed, open a new session for the participant and repeat the task.



Problem: Filling the wrong Position

Problem One participant accidentally filled the wrong position.

Cause Inattention while choosing the position

Solution Correct the mistake

Organization and Staffing Change

Use the transaction code **PPOME** in order to change organization and staffing.

PPOME

In the screen Find by, please expand the organizational unit. Please click on Search Term and enter **Administration** into the field With name.


Administration

Confirm your entry with .

In the Hit List, please choose the **Administration** of Global Bike US (2nd hit from above).

Administration

Hit list	
Existence	Name
	Administration and Financials
	Administration
	Administration and Financials
	Administration

Now you see a list of all ### Security Organization units. Highlight **Administration** in the Staff Assignment and expand all organizational units by clicking .

Highlight Administration

Shift the employees to their right positions via drag & drop and define the vacancy of the particular positions anew.



Problem: Booking of the wrong Event

Problem One participant accidentally booked the wrong event.

Cause Inattention while choosing the event

Solution Correct the reservation and optionally change the number of participants.

Dynamic Attendance Menu

Use the transaction code **PSV1** in order to select the dynamic attendance menu.

PSV1


In the *Dynamic Attendance Menu*, use the following path:

GBI Training and Education ► Security Training ► GBI Security Training

Now you can see a list of all events of your participants. Expand the event with the wrong reservation in order to see the particular participant.



Highlight the objectionable participant and, through the context menu, choose **Rebook** via right mouse click.

In the following screen, please choose the right event. Make sure that **Normal Booking** is activated and confirm your entries by clicking Execute Rebooking .

Normal Booking

Attendee data										
Person		00000074		Ms Judith Little						
Business event catalog										
Free...	Start date	End date	Bus. event	Free ...	Booki...	Waiti...	Optim...	E...	Fi...	Location
	07/22/2013	07/24/2013	001 ST	1	0	0	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DL
	07/22/2013	07/24/2013	003 ST	1	0	0	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DL



Dynamic Business Event Menu (optional)

Use the transaction code **PSV2** in order to select the dynamic business event menu.

PSV2

Note In case two participants switched the booking of their business events, you should increase the capacity of one of those events before rebooking.

In the *Dynamic Business Event Menu*, please use the following path:


GBI Training and Education ▶ Security Training ▶ GBI Security Training

Now you can see a list of all business events. Choose one of the accidentally switched events and click on **Change** in the context menu (right mouse click).

Change the number of attendees (maximum) to **2**.

Number of Attendees			
Minimum	<input type="text" value="1"/>	Optimum	<input type="text" value="1"/>
		Maximum	<input type="text" value="2"/>

Price and Cost Assignment			
Internal price	<input type="text"/>	<input type="text"/>	<input type="button" value="⚙"/>
External price	<input type="text"/>	<input type="text"/>	
Controlling Area	<input type="text"/>	Cost Center	<input type="text"/>

Save  your entries.



Problem: Unable to follow up the Business Event

Problem One participant is not able to follow up his business event.

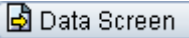
Cause The business event was not firmly booked.

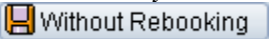
Solution Book the business event firmly.

Firmly Book/Cancel Business Event

Use the transaction **PV12** to book a business event firmly.

PV12

Look for the business event which was not firmly booked by using the F4 help. Now click on the button .

In the *Firmly Book Business Event: Display Attendee List* screen click on .

You get a message that the business event was firmly booked.




Solution: HCM Challenge

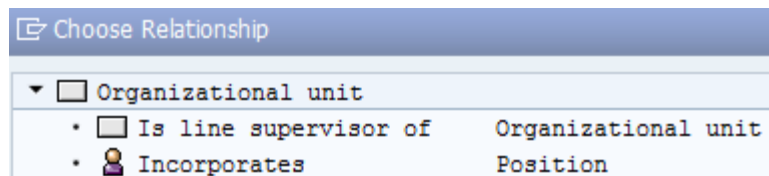
Learning Objective Understand and perform an integrated recruitment process.

Create Organizational Unit

In the course of the transaction **PPOME**, please create a new organizational unit as subordinated organizational unit of the security department.

PPOME


Please highlight your organizational unit Security and click  in the context menu. In the opening screen *Choose Relationship*, click *Is line supervisor of* *Organizational unit*.



A new organizational unit has now been created in your ### Security Department. In the lower part of your screen, you can now see the detailed data for the new position. Please enter the identifiers for the Organizational Unit **### WS** and as General Description **### Plant Security**.

WS

Plant Security



Please enter the **first day of the current month** as Valid from. In case this box is grey and inaccessible, please choose . The functionality of the box should then be available.

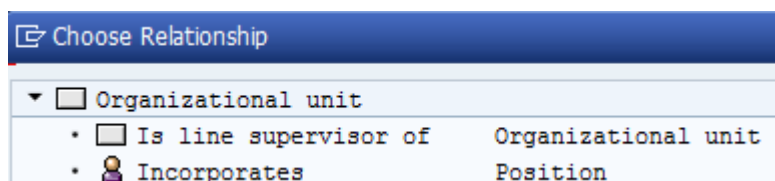
1st of the current month

Use the same pattern to create the organizational unit **### IT (### IT Security)**. This unit is also a subordinated organizational unit of your ### Security Department.

IT

IT Security

Please highlight your organizational unit and click . In the opening screen *Choose Relationship*, please click  *Incorporates*.



A new position has now been created in your ### Security Department. In the lower part of your screen, you can now see the detailed data for the

new position. Please enter the identifiers for the Position **### CoS** and as General Description **### Chief of Security**. Subsequently, activate the checkbox **Head of own organizational unit**.



CoS
Chief of Security
 Head of own organizational
 unit

Move both positions **### Security Guard** and **### Security Manager** in the newly created department **### Plant Security**.

Now create the positions **### Senior IT Admin (### SITA)** and **### Junior IT Admin (### JITA)** an. Both positions should be valid from the first day of the current month.

SITA
Senior IT Admin
JITA
Junior IT Admin
 1st of the
 current month

Staff Assignments (Structure)	Chief	Workfl...
103 Security	Peter Meyer	
103 Chief Security Manager		
Peter Meyer		
103 Chief of Security		
103 Plant Security		
103 Security Manager		
103 Security Guard		
103 IT Security		
103 Senior IT Admin		
103 Junior IT Admin		

Press  to save your data and click on the exit icon  to return to the SAP Easy Access screen.

Create Qualification

In the course of the transaction **OOQA**, you can extend the qualification catalog.

OOQA


In the screen *Catalog: Change Qualification(s)*, please create a new qualification group **### Soft Skills** with a matching scale (e.g. 1-3 Points Scale). Within this new qualification group, please create the qualification **### IT Affinity**.

Soft Skills


Determine Requirement

In the course of the transaction **PPPM**, please determine the requirements for your new positions.

PPPM

In the screen Find by please extend the position  Position and click on Search Term. In the opening window, to find your positions, please enter **###*** into the field With name.


###*


Subsequently, press  Find .

In the lower part of your screen, the results are displayed in the result list. Now choose your newly created position (**### Chief of Security**) and

double-click on it.

An empty list of requirements is displayed in the right part of the screen.

Click  to define new requirements for your position.

Please choose **First Aid Certification** and **GIAC Security Leadership Certification** and **Masters** by selecting individual qualifications. Confirm your selection by clicking .

First Aid Certification
GIAC Security Leadership
Masters


Choose Qualification		
Name	ID	Code
Qualifications catalog (complete)		
Certification	QK 50000014	Certificatio
<input type="checkbox"/> CPR	Q 50000000	CPR
<input checked="" type="checkbox"/> First Aid Certification	Q 50000001	First Aid Ce
<input type="checkbox"/> AIS Certified Protection Pro	Q 50000002	AIS Certifie
<input type="checkbox"/> Security Guard License	Q 50000003	Security Gua
<input checked="" type="checkbox"/> GIAC Security Leadership C	Q 50001075	GIAC Securit
Communication	QK 50000018	Communicatio
Education	QK 50000021	Education
<input type="checkbox"/> Associate Degree	Q 50000022	Associate De
<input type="checkbox"/> Bachelor's Degree	Q 50000023	Bachelor's D
<input type="checkbox"/> GED (High School Diploma)	Q 50000024	GED (High Sc
<input checked="" type="checkbox"/> Masters	Q 50000025	Masters
Work experience	QK 50000038	Work experie

As Proficiency, please enter **Yes** for both First Aid Certification und GIAC Security Leadership, since these qualifications include a certificate which is obtained without gradation. Please mark all requirements as **Essential** by selecting the respective field for the corresponding qualification, and choose the **first day of the current month** as Start Date.

Yes

Essential

1st of the current month

Please click  to save your changes.

Please follow the same pattern to define the Essential Requirements **IT Affinity** (to very good) and **Bachelor's Degree** for your **### Senior IT Admin**. Please remember that the **### Junior IT Admin** is also supposed to have **IT Affinity** as Essential Requirement. Save your changes.

Press  to return to the SAP Easy Access Menu.


Hire Employees

In the course of the transaction **PA40**, you can hire new employees for the positions of the **### Security Guard** in the department **### Plant Security**, and for the positions **### Senior IT Admin** and **### Junior IT Admin** in the **### IT Security**.

PA40

Therefore, please proceed as described in the case study, but choose Hiring and as Social Insurance Number **651783####**, **651784####** und **651785####** for the three positions mentioned above. Please remember using another system ID.

651783###
651784###
651785###

You have now completed the personnel action. Press  to return to the SAP Easy Access Menu.

Change Qualification Profile

In the course of the transaction **PPPM**, you can change the Qualification Profile of your employees.

PPPM


Since your former Chief Security Manager and future Chief of Security has obtained his master degree via distance learning, this fact needs to be included into his profile.


Please use the field Find by to search for your employee who holds the positions of the Chief Security Manager. To do so, please choose **Person** → **Search Term** and enter the **Last Name** as search term. Please select your employee via double-click.

Last Name

On the right side of the screen, you can now see the profile of the employee. In the tab Qualifications you can see all qualifications of your employee.

Qualification group	Name
Certification	First Aid Certification
Certification	GIAC Security Leadership Certifi...
Education	Masters



Please add new qualifications by clicking , which is positioned under the table.

Extend Education and choose **Masters**. Please confirm your changes by clicking . Change the Start Date to the **first day of the current month** and choose a **grade of your own choice** as Proficiency.

Masters
1st of the current
month
Grade of your own
choice

Please follow the same pattern to assign the necessary **IT Affinity** and the **Bachelor's Degree** to the **Senior IT Admin** and the necessary **IT Affinity** to the **Junior IT Admin**.

Very high IT Affinity
Bachelor's Degree
Very high IT Affinity

Save your changes by clicking  and press  to return to the SAP Easy Access Menu.


Transfer Employee

In the course of the transaction **PPOME**, you can transfer your employees.

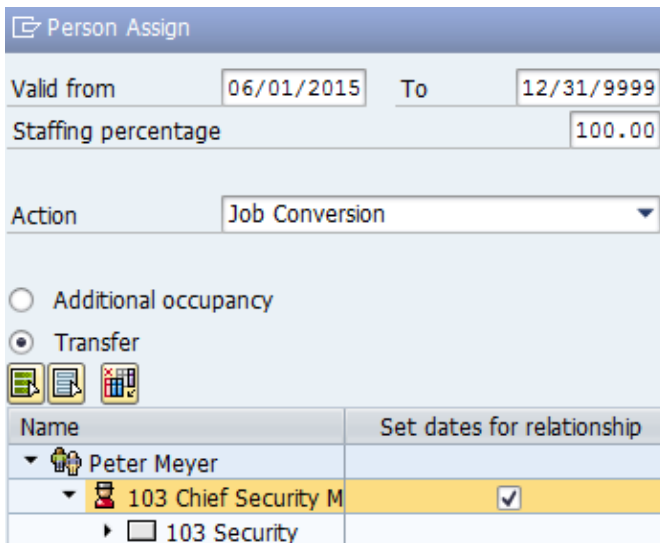
PPOME

In the screen Organization and Staffing Change, you can see the Staff Assignment of your ### Security Department with the sub branches ### Plant Security and ### IT Security and the newly hired employees.

Your ### Chief Security Manager is supposed to take the position of the Chief of Security. For this purpose, please use the drag & drop function to drag your employee to the vacant position of the ### Chief of Security.

Consequently, the screen *Person Assign* opens. Please enter the **first day of the current month** as Valid from and **100%** as Staffing Percentage. Choose **Job Conversion** as Action. Select the position of the Chief Security Manager to set dates for relationship. Compare your changes to the following screenshot and choose .



1st of the current month
100%
Job Conversion
Select Link terminate



Name	Set dates for relationship
▼ Peter Meyer	
▼ 103 Chief Security M	<input checked="" type="checkbox"/>
▶ 103 Security	

Please create a vacancy for the position of the Chief Security Manager valid from today's date. Furthermore, please delimit the vacancy of the position of the Chief of Security on the first day of the current month. Click **Yes** to confirm the dialogue.

As you can see, your employee was transferred directly from the position of the Chief Security Manager to the position of the Chief of Security.

Save  the profile and press  to return to the Easy Access Menu.

