Personnel Planning and Development
Using SAP® ERP HCM
# Contents at a Glance

## Part I Basic Principles

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Overview of SAP ERP HCM</td>
<td>23</td>
</tr>
<tr>
<td>2</td>
<td>Organizational Management</td>
<td>35</td>
</tr>
<tr>
<td>3</td>
<td>Role Concept in SAP ERP HCM</td>
<td>111</td>
</tr>
<tr>
<td>4</td>
<td>SAP NetWeaver Portal in SAP ERP HCM</td>
<td>139</td>
</tr>
<tr>
<td>5</td>
<td>SAP Business Workflow</td>
<td>147</td>
</tr>
<tr>
<td>6</td>
<td>Queries in SAP ERP HCM</td>
<td>155</td>
</tr>
</tbody>
</table>

## Part II Talent Management

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Introduction to Talent Management</td>
<td>167</td>
</tr>
<tr>
<td>8</td>
<td>Skill Management</td>
<td>177</td>
</tr>
<tr>
<td>9</td>
<td>Appraisal and Objectives</td>
<td>207</td>
</tr>
<tr>
<td>10</td>
<td>Training and Event Management and SAP Learning Solution</td>
<td>255</td>
</tr>
<tr>
<td>11</td>
<td>SAP E-Recruiting</td>
<td>365</td>
</tr>
<tr>
<td>12</td>
<td>Enterprise Compensation Management</td>
<td>431</td>
</tr>
</tbody>
</table>

## Part III Personnel Planning and Analysis

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Personnel Planning Process</td>
<td>441</td>
</tr>
<tr>
<td>14</td>
<td>Position and Quota Planning</td>
<td>453</td>
</tr>
<tr>
<td>15</td>
<td>Personnel Cost Planning and Simulation</td>
<td>467</td>
</tr>
<tr>
<td>16</td>
<td>Analysis of Personnel Planning and Development Using SAP NetWeaver BW</td>
<td>491</td>
</tr>
<tr>
<td>17</td>
<td>SAP Strategic Enterprise Management</td>
<td>513</td>
</tr>
</tbody>
</table>

## Appendices

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Infotypes in Personnel Planning and Development</td>
<td>521</td>
</tr>
<tr>
<td>B</td>
<td>Reports in Organizational Management</td>
<td>537</td>
</tr>
<tr>
<td>C</td>
<td>Authorization Objects</td>
<td>541</td>
</tr>
<tr>
<td>D</td>
<td>BAdIs in the Appraisal and Objectives Component</td>
<td>543</td>
</tr>
<tr>
<td>E</td>
<td>Explanations for Process Models</td>
<td>545</td>
</tr>
<tr>
<td>F</td>
<td>Recommended Reading</td>
<td>549</td>
</tr>
<tr>
<td>G</td>
<td>The Authors</td>
<td>551</td>
</tr>
</tbody>
</table>
# Contents

Introduction .......................................................................................................................... 17

## PART I Basic Principles

### 1 Overview of SAP ERP HCM ................................................................. 23

1.1 SAP ERP HCM as an Integrated Component of SAP ERP and the SAP Business Suite ......................................................... 23

1.2 SAP ERP HCM Components .................................................................. 25

1.3 Personnel Master Data ........................................................................... 27

1.3.1 Basic Structure ................................................................................. 28

1.3.2 Maintaining and Displaying Master Data ...................................... 29

1.3.3 Integration into Personnel Planning and Development ................ 33

1.4 Conclusion .............................................................................................. 34

### 2 Organizational Management ......................................................... 35

2.1 Business Foundations ................................................................................. 35

2.2 The Process in SAP ERP HCM ............................................................ 36

2.2.1 Basic Terms .................................................................................. 36

2.2.2 Selecting Object Types and Relationships ................................... 42

2.2.3 Status Administration .................................................................... 46

2.2.4 Evaluation Paths ............................................................................. 47

2.2.5 Organizational Structure ............................................................... 48

2.2.6 Task Catalog .................................................................................. 50

2.2.7 Maintenance Interface ................................................................... 53

2.2.8 Organizational Management as a Basis for Planning and Development ............................................................. 61

2.2.9 Organizational Management as the Basis for Personnel Administration ......................................................... 63

### 2.3 Implementation in SAP ERP HCM .................................................. 66

2.3.1 Maintaining the Organizational Structure ...................................... 66

2.3.2 Maintaining Structures .................................................................. 75

2.3.3 Maintaining the Matrix Organization ........................................... 77

2.3.4 Selected Infotypes ........................................................................... 80
## Contents

2.3.5 Creating Individual Evaluation Paths ........................................ 82  
2.3.6 Creating Object Types .......................................................... 83  
2.3.7 Expanding and Creating Infotypes ......................................... 90  
2.3.8 Adjusting the Maintenance Interface ...................................... 93  
2.3.9 Working with Different Plan Versions .................................. 98  
2.3.10 Reports in Organizational Management ............................... 100  
2.3.11 Transporting Structures ...................................................... 105  
2.4 Process Examples ...................................................................... 106  
2.4.1 Creating New Positions with the Application Process ......... 106  
2.4.2 Scenario Planning ............................................................... 108  
2.5 Critical Success Factors ............................................................. 110

### 3 Role Concept in SAP ERP HCM ................................................ 111

3.1 Meaning of the Role Concept ..................................................... 111  
3.2 Implementation of the Role Concept .......................................... 112  
3.2.1 Definition of Roles in the System .................................... 112  
3.2.2 Assignment of Roles in the System ................................. 115  
3.2.3 Connection between Role and User ................................ 117  
3.3 Authorizations in SAP ERP HCM ............................................... 118  
3.3.1 Central Authorization Objects ...................................... 119  
3.3.2 Structural Authorization Check ....................................... 123  
3.3.3 Special Concepts in HCM Authorization ........................... 129  
3.3.4 Context-Dependent Authorization Check ....................... 135  
3.4 Critical Success Factors ............................................................. 137

### 4 SAP NetWeaver Portal in SAP ERP HCM ................................. 139

4.1 Basic Principles of SAP NetWeaver Portal ............................... 140  
4.1.1 User Management .......................................................... 140  
4.1.2 Components of Portal Applications ................................ 141  
4.2 Business Packages in SAP ERP HCM ...................................... 142  
4.2.1 Employee Self-Services (ESS) .......................................... 143  
4.2.2 Manager Self-Services (MSS) .......................................... 144  
4.3 Reporting in the Portal ............................................................. 144  
4.4 Conclusion ............................................................................. 145
## Contents

### 5 SAP Business Workflow ........................................................... 147
- 5.1 Features and Interactions .................................................. 147
- 5.2 Integrating Workflows in SAP ERP HCM ......................... 148
- 5.3 Workflow Builder ............................................................ 149
- 5.4 Default Elements in Personnel Planning and Development .... 151
- 5.5 Processor Search ............................................................. 152
- 5.6 Critical Success Factors .................................................... 152

### 6 Queries in SAP ERP HCM ...................................................... 155
- 6.1 Introduction .................................................................... 155
  - 6.1.1 Structure and Technology of Queries ........................ 155
  - 6.1.2 Logical Databases in SAP ERP HCM ....................... 157
- 6.2 Implementation in SAP ERP HCM ..................................... 158
  - 6.2.1 Use and Deployment Areas of Query in Personnel Planning and Development .... 158
  - 6.2.2 Using SAP Query .................................................... 159
  - 6.2.3 Ad-hoc Query ........................................................ 161
  - 6.2.4 Ad-hoc Query vs. SAP Query ................................. 163
- 6.3 Critical Success Factors .................................................... 163

### PART II Talent Management

### 7 Introduction to Talent Management ....................................... 167
- 7.1 What is Talent Management? .......................................... 167
  - 7.1.1 Defining the Target Groups .................................... 167
  - 7.1.2 Areas of Talent Management .................................. 168
  - 7.1.3 Design Framework of Talent Management .............. 168
- 7.2 Talent Management in SAP ERP HCM ............................... 169
  - 7.2.1 Parts ................................................................. 170
  - 7.2.2 Enhanced Job Architecture .................................... 173
  - 7.2.3 Infotypes .......................................................... 174
  - 7.2.4 Prerequisites for Usage ......................................... 175
- 7.3 Conclusion ...................................................................... 176
## Table of Contents

### 8 Skill Management

- **8.1 The Process in SAP ERP HCM** .................................................. 177
  - 8.1.1 Qualifications Catalog .................................................... 177
  - 8.1.2 Profiles ........................................................................... 181
  - 8.1.3 Reports .......................................................................... 183
  - 8.1.4 Integration ..................................................................... 184
- **8.2 Implementation in SAP ERP HCM** ............................................... 186
  - 8.2.1 Basic System Settings ..................................................... 186
  - 8.2.2 Maintenance of the Qualifications Catalog ..................... 190
  - 8.2.3 Working with Profiles ..................................................... 194
  - 8.2.4 Central Control ............................................................... 200
- **8.3 Decentralized Skill Maintenance Sample Process** ................. 202
- **8.4 Critical Success Factors** ............................................................... 203

### 9 Appraisal and Objectives

- **9.1 The Process in SAP ERP HCM** .................................................. 207
  - 9.1.1 Functional Scope ............................................................ 207
  - 9.1.2 Appraisal and Objective Setting Process ......................... 208
  - 9.1.3 Integration ..................................................................... 213
- **9.2 Implementation in SAP ERP HCM** ............................................... 215
  - 9.2.1 Basic Customizing Settings ............................................. 215
  - 9.2.2 Customizing in the Catalog for Appraisal Templates ...... 217
  - 9.2.3 Business Server Pages ..................................................... 237
  - 9.2.4 Creating Appraisal and Objective Settings ...................... 239
  - 9.2.5 Reporting ....................................................................... 242
- **9.3 Innovations in Enhancement Package 4** ...................................... 246
  - 9.3.1 New User Interface with Web Dynpro ABAP .................. 247
  - 9.3.2 Cascading Goals ............................................................. 248
  - 9.3.3 Team Calibration and Compensation .............................. 249
  - 9.3.4 Integration with SAP Enterprise Learning ...................... 251
- **9.4 Critical Success Factors** ............................................................... 252

### 10 Training and Event Management and SAP Learning Solution

- **10.1 Business Foundations** .......................................................... 255
  - 10.1.1 Forms of E-Learning ....................................................... 256
10.1.2 When Can E-Learning Be Used Effectively? ..................... 257
10.1.3 Advantages of E-Learning ............................................... 260
10.1.4 The Strategic Importance of E-Learning .......................... 261
10.2 Learning Management Systems ............................................. 262
10.3 Design of Training and Event Management in SAP ERP HCM ... 263
  10.3.1 Training and Event Management Structure .................... 264
  10.3.2 Dynamic Menus ............................................................. 267
  10.3.3 Integration of Training and Event Management .............. 272
10.4 Implementation in SAP ERP HCM ............................................. 288
  10.4.1 Setting Up the Training Catalog .................................... 288
  10.4.2 Planning in Training and Event Management ................. 302
  10.4.3 Daily Activities ............................................................... 311
  10.4.4 Follow-Up Processing of Courses .............................. 322
  10.4.5 ESS in Training and Event Management .................. 326
10.5 Sample Process: Paperless Training and Event Management .. 326
10.6 Critical Success Factors ......................................................... 329
10.7 SAP Learning Solution ................................................................. 329
  10.7.1 The SAP Research Project in the Area of Learning ........ 329
  10.7.2 Features of the Service ................................................... 330
  10.7.3 Integration of SAP Learning Solution with SAP ERP HCM  338
  10.7.4 Innovations in Enhancement Package 4 ..................... 342
  10.7.5 Sample Processes for E-Learning ............................. 348
  10.7.6 Project Development ..................................................... 360
  10.7.7 Critical Success Factors .............................................. 362

11 SAP E-Recruiting ....................................................................... 365

11.1 Business Principles ................................................................. 365
  11.1.1 Goals of the Recruitment Process ............................... 365
  11.1.2 Goals of Succession Planning .................................. 366
  11.1.3 Recruitment Media ......................................................... 366
  11.1.4 Managing the Application Process ............................ 369
  11.1.5 Applicant Selection ......................................................... 371
  11.1.6 Recruitment Controlling ............................................. 372
  11.1.7 Internet Recruiting ......................................................... 373
11.2 Specific Features of E-Recruiting ............................................... 374
  11.2.1 War for Talent .............................................................. 375
## Contents

11.2.2 Sourcing and Retention .................................................. 375
11.2.3 Controlling Recruitment Processes ................................. 376
11.2.4 Processes and Organization ............................................ 376
11.2.5 Recruitment Service Providing ........................................ 377
11.2.6 Technology ................................................................. 377

11.3 The Process of Recruitment in SAP ERP HCM ...................... 378
  11.3.1 Overview ....................................................................... 378
  11.3.2 Processes and Roles of Recruiting ................................... 380
  11.3.3 Requisitions ............................................................... 382
  11.3.4 Process Templates .......................................................... 386
  11.3.5 Questionnaires ............................................................... 388
  11.3.6 Additional Important Terms ............................................ 394

11.4 The Process of Succession Planning in SAP ERP HCM .......... 396
  11.4.1 Overview ....................................................................... 396
  11.4.2 Processes and Roles of Succession Planning .................... 397

11.5 Roles in SAP E-Recruiting ..................................................... 402
  11.5.1 The External Candidate .................................................. 402
  11.5.2 The Internal Candidate ................................................... 414
  11.5.3 The Manager ................................................................. 414
  11.5.4 The Recruiter ................................................................. 416
  11.5.5 The Administrator .......................................................... 420
  11.5.6 Succession Planner ......................................................... 421

11.6 Customizing and Technology ................................................ 422
  11.6.1 Technical Settings .......................................................... 422
  11.6.2 Basic Settings ................................................................. 422
  11.6.3 Talent Warehouse ........................................................... 423
  11.6.4 Applicant Tracking .......................................................... 424
  11.6.5 Activities ........................................................................ 425
  11.6.6 Questionnaires ............................................................... 427
  11.6.7 Requisition Management ............................................... 427
  11.6.8 Additional Technical Issues ............................................. 427

11.7 Additional Innovations in Enhancement Package 4 ............... 428

11.8 Critical Success Factors ...................................................... 428

### 12 Enterprise Compensation Management .............................. 431

12.1 Overview ............................................................................. 431
  12.1.1 Options of Enterprise Compensation Management ........ 431
16 Analysis of Personnel Planning and Development
Using SAP NetWeaver BW ....................................................... 491

16.1 Introduction to SAP NetWeaver BW ................................. 491
16.2 Creating Evaluations with the BEx Query Designer .......... 494
16.3 Reporting Using the BEx Analyzer ................................. 499
16.4 Reporting in the Portal Using the BEx Web Analyzer ...... 502
16.5 BEx Web Application Designer ................................. 503
16.6 Business Content .......................................................... 504
  16.6.1 Strategic Personnel Management ....................... 505
  16.6.2 Organizational Management ............................... 505
  16.6.3 Personnel Development ................................... 506
  16.6.4 Personnel Cost Planning ................................. 506
  16.6.5 Training and Event Management and SAP Learning
         Solution ................................................................. 507
  16.6.6 Performance Management .................................. 507
  16.6.7 Enterprise Compensation Management .................. 508
  16.6.8 Talent Management .......................................... 510
  16.6.9 E-Recruiting ................................................... 511
16.7 Conclusion ................................................................. 512

17 SAP Strategic Enterprise Management .............................. 513

17.1 Basic Principles .......................................................... 513
  17.1.1 Business Foundations ........................................ 513
  17.1.2 Problem Areas ................................................... 514
17.2 SAP SEM System Modules ........................................... 514
  17.2.1 Business Planning and Simulation (SEM-BPS) .......... 515
  17.2.2 Business Consolidation (SEM-BCS) ....................... 515
  17.2.3 Strategy Management (SEM-SM) ......................... 515
  17.2.4 Performance Measurement (SEM-PM) .................... 516
  17.2.5 Stakeholder Relationship Management (SEM-SRM) .... 517
17.3 Relevance to Personnel Management ............................. 517
17.4 Conclusion ................................................................. 517
Contents

Appendices ................................................................. 519

A Infotypes in Personnel Planning and Development ...................... 521
B Reports in Organizational Management ........................................ 537
C Authorization Objects .......................................................... 541
D BAQis in the Appraisal and Objectives Component ....................... 543
E Explanations for Process Models ............................................... 545
F Recommended Reading .......................................................... 549
G The Authors ......................................................................... 551

Index .................................................................................... 553
Organizational Management is a powerful and flexible component that forms the basis for the processes in Personnel Planning and Development.

2 Organizational Management

The following sections will describe the aspects of the Organizational Management component that are important for Personnel Planning and Development. We will begin with an overview of the relevant terms and concepts.

2.1 Business Foundations

In organizational theory, the inherent distinction between structure and process organization is also significant for Personnel Planning and Development. The organization of the processes determines the need for qualifications among the employees who carry out these processes. The process organization with superior and subordinate work centers determines careers and career paths. The following aspects are integral to Personnel Development:

- **Requirements profile of the work center**
  The requirements of a work center are derived from its job description. If personnel responsibility is among the requirements, for example, then the requirements most likely also include the area of soft skills such as leadership capability, communication capability, and so forth. The more precisely a work center is described, the more suitable the employees who are hired for that work center will be.

- **Qualifications profile**
  The counterpart to the requirements profile is the qualifications profile. It contains the qualifications an employee possesses. Personnel development works to expand existing qualifications and identify and develop an employee's missing qualifications. Even if they are not necessary for an employee's current tasks, missing qualifications should be acquired and additional qualifications should be both maintained and encouraged, by charting career paths or via effective succession planning.

- **Appraisals**
  An employee’s potential and career goals can only be evaluated and explored via appraisal that is consistently shared and expectations that are clarified. Appraisals also serve to update the qualification profile of an employee.
Needs
The task of Personnel Development is to fulfill the qualitative and quantitative needs of the company. The reorganization of the organizational structure or processes can act as a catalyst, causing new needs to arise or freeing up new capacities that must in turn be redistributed.

Careers, Career Paths, and Succession Planning (see Chapter 11, SAP E-Recruiting)
Careers define the development of an employee via the positions that can or must be held over the course of employment at an enterprise to reach a defined career goal. Conversely, succession planning outlines the career path of an employee starting from the target position (i.e., the position that is now vacant) and therefore determines the optimal future staffing of this position.

2.2 The Process in SAP ERP HCM
To understand Organizational Management and its significance for the aforementioned aspects of Personnel Planning and Development, familiarity with the elements of Organizational Management and their interaction is necessary.

2.2.1 Basic Terms
The concept of SAP Organizational Management is developed via a series of basic terms. If you are already familiar with the basic program of Organizational Management, you can skip ahead to Section 2.3, Implementation in SAP ERP HCM.

Plan Version
In Personnel Planning and Development, a plan version represents a world of its own. These versions are used to test or walk through various planning scenarios. An organizational structure can therefore be reorganized into a particular plan version, and its effects on the organization can be investigated. For this reorganization, the current plan version must be copied to additional versions.

The current version, also called an integration plan version, refers to the versions that are used productively in SAP ERP HCM. These versions are specified once at the first implementation (usually at “01”). The integration plan version is then also the only plan version whose change has a direct influence on Personnel Administration if integration is active. An integration plan version specified once may not be changed again because this would cause inconsistencies to appear in the database. Data on positions, organizational units, or jobs in Infotypes (see the following section) are therefore always created under specific plan versions. If the version was changed, then the data was no longer active and therefore led to inconsistencies. You can set the plan version to be edited
via the menu path Human Resources • Organizational Management • Settings • Set Plan Version.

Infotypes

The organizational structure in SAP ERP HCM consists of several objects based on object types. These objects, in turn, are connected with one another via different relationships. Objects are identified via a unique key that is composed of the plan version, the object type, and the object key – such as “01 O 00000001” for an organizational unit (see Figure 2.1).

The data in SAP ERP HCM Organizational Management is stored in infotypes, as is the data in Personnel Administration. An infotype is a grouping of data fields according to logical aspects. Personnel administration, for example, includes the infotypes “Address” and “Bank Information.”

For the user, an infotype is the same as an entry mask. Within an infotype, there are plausibility checks and mandatory fields. Infotypes can also be organized into subtypes and they always have a validity period. Infotypes can be brought into a logical sequence via what is called an infogroup and therefore aggregated to an action. In addition to the name, infotypes are identified with a four-digit number. The numeric range of Personnel Planning and Development – and therefore, also of Organizational Management – lies between 1000 and 1999. Figure 2.1 shows Infotype 1000 (Object) as an example.

Programmers will be interested in the fact that infotype data is located in tables in the database that are named after the infotype number. The infotypes for Personnel Administration are stored in tables with the name “PAnnnn” (nnnn=infotype number);
the data of the infotypes for Personnel Recruitment is stored in tables with the name PBnnnn; and the database tables of the Personnel Planning and Development infotypes are called “HRPnnnn.” The database table for Infotype 1000 (object) is therefore called HRP1000.

Subtypes
Subtypes handle the subdivision of an infotype into screens for similar facts. Infotype 1001 (relationships) will serve as an example here. In Organizational Management, the most varied relationships exist between individual objects. For each of these relationships, there is a subtype of Infotype 1001 (relationships). For example, the subtype A 002 “reports to” and B 002 “is line manager for” handles the relationship of two organizational units (see also Figure 2.2).

Subtype B 002
(Is Line Manager of)

Subtype A 002
(Reports to)

Organizational Unit A

Organizational Unit B

Figure 2.2 Relationships Between Organizational Units

Time Constraint
One of the most important characteristics of the infotype concept is the time constraint. Only by using a time constraint can we track the history of Personnel Planning and Development. The time constraint specifies whether an infotype may appear several times in the system or whether it must exist without gaps. The following list distinguishes the various constraint types:

- **Time constraint 0**
  Across the entire validity period of the object, there must be precisely one record (and it must always be the same one). This time constraint is not used in Personnel Planning and Development.

- **Time constraint 1**
  Exactly one valid record must be present at any given time. Overlaps are not possible. Example: Infotype 1000 (Object). An object such as an organizational unit, for example, is only present with its attributes once at any given time.
The Process in SAP ERP HCM

- **Time constraint 2**
  No more than one valid record may be present at any given time. Gaps are allowed; overlaps are not possible. Example: Infotype 1007 (Vacancy). An object may only be designated once with a vacancy at any given time. It may not be vacant across the entire time period, however.

- **Time constraint 3**
  As many valid records as possible can be present at any given time. Example: Infotype 1001 “Relationships” with particular subtypes (relation types). An organizational unit can be linked with several other organizational units at the same point in time.

The graphical illustration in Figure 2.3 further clarifies the various time constraints.

![Figure 2.3 Time Constraints of Infotypes](image)

Infotypes rarely appear directly in the interface of Organizational Management. Infotype 1000 (Object), for example, is stored indirectly by creating an object.

**Number Ranges**

Depending on the number range that was defined, the system automatically distributes the key numbers for Organizational Management objects. You can define the number assignment via the Implementation Guide (IMG) menu path PERSONNEL MANAGEMENT • ORGANIZATIONAL MANAGEMENT • BASIC SETTINGS • MAINTAIN NUMBER RANGES. Specifically, this is where the number range interval is stored for which the system assigns the object IDs in Organizational Management and for which manual assignment occurs.
In addition, it must be distinguished whether the assignment occurs plan version-independent or for each plan version separately.

If the goal is to exchange data between various plan versions, we recommend that you define the number assignment plan version-independent; otherwise, there is a risk that objects with different meanings will be overwritten. By default, the number assignment works according to the specific version of the plan. If the object key is to be distributed plan version-dependently, you must assign an individual number range to each plan version and, if necessary, to each object type. To activate the plan version-independent number assignment, you must enter an “X” in the field VALUE ABBR. (see Figure 2.4). You can reach this table via the IMG menu path PERSONNEL MANAGEMENT • ORGANIZATIONAL MANAGEMENT • BASIC SETTINGS • MAINTAIN NUMBER RANGES • SET UP NUMBER ASSIGNMENT FOR ALL PLAN VERSIONS.

![Figure 2.4](https://example.com/figure24.png)

**Figure 2.4** Activating the Number Assignment for All Plan Versions

To determine the type of number assignment and the number range, you must use the IMG menu path PERSONNEL MANAGEMENT • ORGANIZATIONAL MANAGEMENT • BASIC SETTINGS • MAINTAIN NUMBER RANGES. You have the following options:

- **Internal number assignment**
  The SAP system assigns the numbers automatically. The number ranges are marked with “INT.”

- **External number assignment**
  The user assigns the numbers. The number ranges are marked with “EXT.”

If you have decided against the plan version-independent number assignment, you must define the number range per object type and plan version. Otherwise, you can determine the number range per object type. Individual number ranges (subgroups) are assigned to the object types. The names of the subgroups are constructed such that the first two places determine the plan version more precisely and the last two places determine the object type.
Example

Number assignment for plan version 10, object type S: subgroup 10S. In the definition of subgroups, wildcards are allowed. For example, the character $ stands for one place of the subgroup.

You must adhere to the following conventions during number assignment:

- **Without plan version-independent number assignment**
  
  - $$$$ – plan version and object type masked
  - 10$$ – plan version 10, object type masked
  - 10S – plan version 10, object type S
  - $$ – not allowed!

- **With plan version-independent number assignment**
  
  - $$$$ – plan version and object type masked
  - $$S – plan version masked, object type S
  - 10$$ – not allowed!
  - 10S – not allowed!

After you have acquired the relevant subgroup, you must determine whether you want an internal or external number assignment. Because the objects can also be identified using an abbreviation, it is not necessary to assign meaningful numbers. We therefore recommend that you use an internal number assignment; external number assignment should only be used in exceptional cases. This could be the case if there is a mixed system landscape in which the numbers are assigned by an external system and therefore, no assignment should occur via the SAP system, for example.

In the example in Figure 2.5, you can see how the number assignment for plan version 10 and the subtype S is set up. The standard entry “$$$$” in the Subgroup field stands for all number ranges that are not listed explicitly in the table. Do not delete this entry.

Because the number range maintenance is not linked to the automatic recording for transport from a development system into a productive system, you must manually transport the changes that have been made within the number range interval. Therefore, in the startup screen of number range interval maintenance, you should call up the corresponding function via the menu INTERVAL • TRANSPORT. Generally, however, you will maintain and update your organizational structure directly in the productive system.

In the following explanations, an **internal** and **plan version-independent** number assignment is always assumed.
2.2.2 Selecting Object Types and Relationships

Although the master data of Personnel Administration is created exclusively with the information object “person,” there are different object types in Organizational Management. Generally, a distinction is made between internal and external object types. Organizational units and positions are internal object types, for example, because they are created and maintained directly in Organizational Management. In contrast, persons and cost centers are external object types because their source is Personnel Administration and Controlling. As a component of the unique key (see explanations of the term infotype in Section 2.2.1, Basic Terms), there is an abbreviation for each type of object; for example, the organizational unit is identified with an “O,” the position with an “S,” and the person with a “P.” Objects can be connected to each other to describe their relationship to each other or map structures. Objects and relationships are stored in infotypes. An object always consists of Infotype 1000 (Object) and generally Infotype 1001 (Relationships). The object types that are important for Personnel Development will be described further in the next section.

Organizational Units

The basic modules of an organizational structure are the organizational units, which form the framework for this structure. Organizational units are objects of the organizational structure that are not specifically specified. These units can represent business areas, a team, or a factory. With this general definition, you can construct hierarchies of any depth. The hierarchy is achieved through the superior and subordinate arrangement of the organizational units; that is, the relationships “reports to” and “is line man-
agger for" are used. For the special designation of initially neutral organizational units, the department identifier or the identifier for staff department can be incorporated using Infotype 1003 (Department/Staff) (see Figure 2.6).

![Create Department/Staff](image)

**Create Department/Staff**

**Figure 2.6** Department/Staff Identifier

**Positions**

To be able to incorporate employees into the organizational structure, there are *positions*. This SAP positions are not to be confused with “positions” in civil service. In civil service, financing an employee via funds is considered a position. An SAP position, in contrast, signifies the position occupied by an employee. Free positions that should be staffed in the future can be designated as “vacant.” By designating them as “vacant,” you can make these positions accessible to E-Recruiting in SAP ERP HCM, for example. Positions are always assigned to an organizational unit, for which the relationship “belongs to” is used. *Chief positions* are used for heads of organizational units receive a special identifier. The technical identification occurs via the relationship "is managed" between the organizational unit and the position. Chief positions have special meaning for many areas of the system; for example, in the workflow, they identify responsible supervisors within the organizational structure or, in the Manager Self Service, they identify managers. Even the structural authorization check can make use of chief positions.

**Jobs**

Depending on how many of the following pieces of data are attached to a position, it can be worthwhile to create a type of model for the positions. Some generally valid data such as requirements and tasks could be stored in such a model. With the concept of the *job*, SAP has created such a model. The job is therefore a template for various different positions in a company. One could say that jobs are a possible grouping of positions; the job “secretary” could therefore be the model for the position “secretary Manager A.” Jobs are often used for evaluation purposes because they make it easy to display
how many secretaries or engineers there are in the company, for example, regardless of their characteristics in their respective departments.

**Tasks**

In SAP ERP HCM, there is a distinction between *standard tasks* and *tasks*. *Standard tasks* refer to all activities that can be carried out within the SAP Business Workflow; therefore, a standard task is always an object that is linked to a method. Standard tasks are compiled into a catalog that is derived from the application component structure of the system. An example of a standard task is the execution of a profile comparison between an applicant and a position in recruitment. *Tasks*, on the other hand, describe activities that should be carried out within organizational units.

**Work Center**

Within SAP ERP HCM, a *work center* signifies a place where work is done. Information about particular basic conditions and activities is specified in a work center. Via Infotype 1009 (Health Examinations), for example, you can specify at what temporal interval the occupant of the work center should undergo a particular health check such as an eye test or a precautionary examination of the lungs. In addition, Infotype 1010 (Authorities/Resources) can be used to document which resources must be made available for the work center (such as gas masks and protective goggles) or which authorities and powers of attorney are affiliated the work center (such as commercial power of attorney, power of procuration, or purchasing up to $50,000). Default values such as "Work schedule" (Infotype 1011) and "Employee group/subgroup" (Infotype 1013) can be established for each work center.

**Qualification**

Qualifications are established for jobs and positions in Organizational Management or in the *Personnel Development* component. For *jobs*, qualifications are the default values for the positions derived from the jobs. Using qualifications, requirements profiles are created in the positions that can be used to compare the position’s requirements with an applicant’s or employee’s qualifications. The qualifications are structured in a catalogue that can be reached via the SAP menu **HUMAN RESOURCES • PERSONNEL MANAGEMENT • PERSONNEL DEVELOPMENT • INFORMATION SYSTEM • REPORTS • CATALOG • QUALIFICATIONS**. Figure 2.7 shows the qualifications catalog, which can be completed with self-defined qualifications. For more information about the qualifications catalog, the creation of requirements and qualifications profiles, see Chapter 8, Skill Management.

Figure 2.8 shows the basic structure of Organizational Management.
The Process in SAP ERP HCM

Catalog: Change Qualification(s)

<table>
<thead>
<tr>
<th>Catalog</th>
<th>29/01/2009 - 12/31/2099</th>
<th>D Current plan</th>
</tr>
</thead>
</table>

- Key Qualifications
  - Language skills
    - Chinese
    - English
    - French
    - German
    - Italian
  - Social competency
    - Adaptability
    - Interpersonal skills
    - Management Qualification
    - Pace of work
    - Readiness to take on responsibility

Figure 2.7 Qualifications Catalog

Figure 2.8 Core Structure of Organizational Management

= for Group and/or Hierarchy Creation
2.2.3 Status Administration

Objects, relationships, and other infotypes can be stored in organizational management in a predefined status so that, for example, system-supported approval procedures for the setup of new objects such as positions can be realized (see Figure 2.9). The statuses influence the availability of objects and infotype records in the structure maintenance. The following statuses exist:

- **1 – active**
  The object or infotype record is currently usable. The processing activities for an object in the active status are unlimited. Objects or infotype records with the “active” status can be created, displayed or limited, deleted, and listed. Only objects with this status can be linked to other active objects.

- **2 – planned**
  The object or the infotype record can be suggested but is not active, that is, usable. Objects that have the “planned” status can be created, displayed, limited, deleted, or listed. It is not possible to create a link to active objects.

- **3 – submitted**
  This is an object or an infotype record of a person or group of people to be checked, which can be approved or declined. Objects and infotype records that have the “submitted” status cannot be created or changed. It is not possible to create a link to active objects.

- **4 – approved**
  This status means that a previously submitted object or submitted infotype record was accepted or approved. Processing of the data is only possible, however, if the “approved” status is converted to the “active” status. It is not possible to create a link to active objects.

- **5 – rejected**
  If a previously submitted object or infotype record is not approved, its data can only be displayed. Processing is only possible if the object or the infotype record is converted to the “planned” status. It is not possible to create a link to active objects.

Using the RHAKTI00 report or the detail maintenance (see explanations on Entering Additional Data for Objects in Section 2.3.1), the status of objects can be changed after the fact. The report enables you to change many objects and infotype records simultaneously. Conversely, detail maintenance can only be used to change individual objects and infotype records.
2.2.4 Evaluation Paths

Evaluations of Organizational Management can consider an evaluation path as selection criterion. The maintenance of the organizational structure can also be expedited on the basis of an evaluation path. To be able to construct a structure from organizational units and positions, for example, the system must be given a start object and a rule that describes the path the evaluation should take from the start object as well as which objects should be displayed. An example is the evaluation path O-O-S-P (see Figure 2.10). This path lists the start object (an organizational unit) and all organizational units that are below it hierarchically (O-O-S-P). In addition, all positions are displayed that are linked to the organizational units displayed (O-O-S-P). Finally, the structure also shows the people who occupy the positions (O-O-S-P).

Figure 2.9 System-Supported Approval Process for Objects and Infotype Records

Figure 2.10 Evaluation Path O-O-S-P
For clarification, Figure 2.11 shows how the system selects a particular quantity of employees that fulfill the specified selection criteria via an evaluation path. In this example, all employees in the personnel department should be selected whose position was created on the basis of the “secretary” job. What results is a display of all secretaries of the personnel department.

If the existing evaluation paths do not meet your demands, or individual object types and relationships were created, you can establish individual evaluation paths. For more information, see Section 2.3.5 Creating Individual Evaluation Paths.

2.2.5 Organizational Structure

The organizational structure of the enterprise can be mapped with the objects of type “Selecting Object Type and Relationships”, introduced in Section 2.2.2, and Infotype 1001 “Relationships.” There, the structure is always depicted in a tree graphic in SAP ERP HCM Organizational Management. Accordingly, hierarchically subordinate organizational units appear under the superior units. The user always looks at the organizational structure across a particular startup period. Depending on whether the objects are located within or outside of the review period, they are displayed or hidden. The beginning and ending dates of Infotype 1000 (Object) and Infotype 1001 (Relationship) are considered as criteria in the process.
If there is a relationship between cost centers on the one hand and organizational units and positions on the other, then there must be a link between the cost center structure and the organizational structure. If the information in Personnel Administration (i.e., the employee's master data) is actively integrated with Organizational Management, the cost center information can be adopted from the organizational structure into the employee master data (in Infotype 0001 [Organizational Assignment]). With inheritance, this particular data – such as the cost center – does not have to be maintained individually for each organizational unit. The effect of inheritance is displayed when a cost center that is maintained at the uppermost organizational level is authoritative for all subordinate organizational units until a deviating cost center is maintained (see Figure 2.12).

![Figure 2.12 Inheritance Using the Example of Allocation](image)

If, in addition, the account assignment features – such as controlling area, company code, and the business area of organizational units – should be handed down to subordinate positions, this must be set via the IMG path of ACCOUNT ASSIGNMENT FEATURES. You must enter an “X” in the field VALUE ABBR. for the group PPOM and the semantic abbreviation INHS (see Figure 2.13).
The significance of inheritance becomes apparent if you keep in mind that the maintenance of cost center assignment is stored entirely in organizational management and, in the ideal case, each cost center must only be assigned once. The maintenance effort is therefore reduced significantly and the cost centers of the employees can be acquired more easily. This is because you can check the employee’s position first and, if no cost center is maintained, you can look at the organizational units with which the position is linked.

To determine authorization administration, you should refer to the organizational structure for the structural authorization, which can indicate the authorization objects by the assignment “person – position – organizational unit” and provide the user with, for example, the maintenance or view authorization for the corresponding organizational units in SAP ERP HCM.

Revised Reading
If you are interested in authorizations in general, and structural authorizations in particular, the SAP PRESS book Authorizations in SAP ERP HCM is recommended. The appendix provides full bibliographic information and additional recommended books.

The organizational structure is also integral to the SAP Business Workflow. For example, the workflow can be based on a chief position, identify an employee’s supervisor, and therefore forward particular workflow tasks such as the approval of a vacation request to the superior. You will find more details on the topic of workflow in Chapter 5, SAP Business Workflow. In the positions created in the organizational structure and in jobs, tasks can be stored that describe the activities of a specific position or job.

2.2.6 Task Catalog

Tasks serve multiple purposes in SAP ERP HCM. On the one hand, with the help of a task assignment to jobs or positions, a job description or job profile can be created. On the other hand, the assignment of tasks to jobs and positions controls the workflow, which forwards tasks to only those employees to whom performing these tasks is assigned. Both types of tasks are located hierarchically or grouped in the task catalog (see Figure 2.14). This catalog is already filled with some tasks in the standard version and it can be customized to meet each customer’s needs.
Within the SAP ERP HCM system, tasks can be organized into various classes, including professional, personal, or disciplinary. Task can also be assigned to no class. To ease the maintenance of the assignment of activities that are routinely carried out together to jobs and positions, you can group tasks. You can access the task catalog from the SAP menu via.

In the maintenance of the task catalog, you should note that the hierarchy of the catalog arises because a new object must always be created from the object that is above it or superior to it. A new task at the uppermost level must therefore be created starting from the task catalog as the uppermost object. The following attributes can be assigned to the tasks in the form of infotypes:

- **Description (1002)**
  Here, a detailed description of the task can be stored as free text. You can export already compiled texts into this infotype as long as they are in *.txt format. This infotype is of a purely informational character.

- **Character (1004)**
  The assignment of tasks to particular character properties handles the categorization of tasks according to ranking, phase, and purpose. The values of the categories can be seen in Figure 2.15. These categories enable support for salary and wage findings and deliver information, for example, about whether the tasks of a job or position contribute directly to the support of the company goals. You can evaluate the stored information using reports RHXIAW04 “Characterization of a task in an organization” and RHXIAW05 “Characterization of individual tasks.”
Organizational Management

- **Standard Profile (1016)**
  Using this infotype, you assign – depending on the respective task – profiles that enable the user to carry out particular activities on the system (for more information about authorizations, see Chapter 3, The Role Concept in SAP ERP HCM). Authorization profiles are assigned to users of the system individually. With the infotype “Standard profile,” these profiles can be assigned to an organizational unit, job, position, or task and they can be transferred to employees via inheritance. The only prerequisite for this is that the employee is linked with one of the abovementioned objects – that is, that this employee is in the corresponding position or that the corresponding task is assigned to that employee. The assignment of the profiles specified here to the respective users is started via report RHPR0FL0. The prerequisite for a correct assignment of profile to user is the relationship between a person in the system and a user via Infotype 0105 (Communication) in the personnel master data.

- **PD Profile (1017)**
  Similar to Infotype 1016 (Standard Profile), profiles such as a task are also assigned to this infotype. The PD profiles control the structural authorization, that is, which objects a user can display or process within the organizational structure. Via report RHPR0FL0, the infotype enables the automatic assignment of structural authorization profiles to users. Because PD profiles only regulate access to organizational management, it is imperative that the infotype “Standard Profile” also be maintained.

- **Qualification Management (1055)**
  This infotype serves to assign qualifications or qualification blocks (new object type) to tasks.

- **Classification/Lock Indicator (1217)**
  This infotype must be created for workflow tasks. The tasks can be classified according to the following criteria: “General task” means that each participant in the work-
flow may carry out this task. “General forwarding allowed/not allowed” expresses that the task may or may not be forwarded to users to whom this task is not assigned directly.

- **Exposure: Long-term Average (1403)/Exposure: Task-related (1404)**
  With these infotypes, you can create and manage basic data needed for planning and conducting precautionary examinations for occupational health in your enterprise. This requires using the *SAP Environment, Health, and Safety Management* (SAP EHS Management) component.

### 2.2.7 Maintenance Interface

The maintenance interface of Organizational Management was thoroughly reworked with Release 4.6C. The old maintenance interface from previous releases is no longer used in many enterprises; however, it is still available in the system and is currently offered in expert mode or easy maintenance. If you prefer using the old maintenance interface, you can set this as the default via SYSTEM • USER PROFILE • OWN DATA, on the PARAMETERS tab (see Figure 2.16). This setting only works with Transaction PPOM, however.

**Figure 2.16** Default Setting for the Maintenance Interface

The interface combines many useful functions on one screen, divided into four areas (see Figure 2.17). Because of the *split-screen technology*, you can enlarge or shrink the individual areas of the screen with the mouse depending on the screen area in which you are currently working.
The starting point for processing an organizational structure is the start object. Using the search area, the start object is acquired using various search tools (see Figure 2.18).

![Search Area Diagram](image_url)
The search enables you to conduct a search of an entire structure or object or a particular object, for example, positions. In the standard version, there are three search tools for objects:

- **Search Term**
  By entering a search term, you can search for the abbreviation, the long name, and the key of an object. You can also search for objects that are assigned directly or indirectly to another object (see Figure 2.19).

- **Structure search**
  The structure search enables you to search for the desired object using the existing organizational structure.

- **Free Search**
  The free search enables you to select an object by combining multiple criteria (see Figure 2.20). By using the *infoset query* (see Chapter 6, *Queries in SAP ERP HCM*), you can determine which fields are used for selection and which fields are used for the task list.
You can save selections that were carried out as search variants (see Figure 2.21). Note that it is the selection criteria that are saved, not the result list; that is, when a stored search variant is called up, the system selects the saved criteria. You can start the search variants, which appear in the search area, by simply clicking the mouse.
Selection Area

After successful selection using the search area, the results of the selection are copied into the selection area. With the structure search, the selection area displays the entire active organizational structure. Depending on the object for which you are searching, the organizational structure appears in various stages of detail. If, for example, starting from the object “organizational unit,” the structure search was called, the structure of the organizational units is displayed in the selection area. If, conversely, the search starts from the “position” as search object, only the structure of the organizational units up to the level of the positions is visible. In contrast to the structure search, the other search tools deliver a result list and no structure.

Users can customize the selection area through various functions (see Figure 2.22):

- **Result list large/small**
  The display of the list can be enlarged with this function. The entire left area of the screen is then reserved for the list. The search area is hidden.

- **Details**
  All available information is displayed for an entry from the result list.

- **Sorting**
  The contents of the columns can be sorted in ascending and descending order.

- **Set/delete filter**
  By setting filters, the result list can be further limited. Therefore, the information that is provided by the list can be used. Columns that should serve as filter criteria are selected from the column inventory.

- **Total**
  If the result list contains numbers that can be totaled, their sum can be obtained using this function.

- **Excel inplace**
  By default, lists are displayed in the grid control. This display enables columns to be moved with drag and drop. Alternatively, you can display lists in Excel inplace, which, if selected, transfers the list data to Excel, where it is displayed. The only
prerequisite is that Excel is installed on the PC in question and that a corresponding template – in this case sap_om.xls – is available.

- **Column configuration**
  Here, the user can set which information should be displayed in the columns (see Figure 2.23). The selection of information depends on which objects are currently displayed in the selection area. The column configuration exists in the selection area and also in the overview area.

![Column Configuration](image)

**Figure 2.23**  Column Configuration

The search area and the selection area together produce the *object manager*. The object manager can be displayed using the menu SETTINGS • HIDE OBJECT MANAGER.

- **Overview Area**
  By double-clicking on an entry from the selection area, that entry is copied into the overview area. From there, for example, new objects can be incorporated into the structure, and existing objects can be deleted or changed. The overview area contains various views of the selected objects (see Figure 2.24). Thus, for example, the assignment of tasks to positions or organizational units or a staffing plan can be displayed as a list or structure. The “Goto” function allows for switching between the individual views of Organizational Management.

- **Detail Area**
  If, in the overview area, an object is selected with a double-click, individual *tab strips* appear in the detail area. On the tab strips, information with content that belongs together is summarized. Data of several infotypes can appear on a tab strip. Figure 2.25 shows the tab strips from the detail area of an organizational unit.
Views in the Overview Area

Figure 2.24 Views in the Overview Area

Information of Infotype 1000 (Object), 1001 (Relationships), 1003 (Department/Staff), and 1002 (Verbal Description) is displayed on this tab strip. The detail area can be adjusted. You will find more information about this in Section 2.3.7, Expanding and Creating Infotypes. If information is already stored on a tab strip, it is marked with a green checkmark.
Interaction of the Areas

Objects that are selected using the search area appear in the selection area in the form of a structure or list. By selecting an object from the result list, this object is copied into the overview area. The overview area contains various display types via various evaluation paths. The data can be displayed as a list or as a tree structure. From the overview area, the organizational structure is maintained; that is, a new objects area can be created, and existing objects can be limited, copied, or deleted. By double-clicking on an object from the overview area, you can branch into the detail area. From here, you can maintain object properties on tabs.

Using drag and drop, you can assign objects from the selection area to the overview area. For example, you can assign a person from the selection area to a position in the overview area (see Figure 2.26).

![Figure 2.26 Assignment via Drag and Drop](image)

Even an organizational change – such as the moving of positions into another organizational unit – can be carried out using drag and drop. Because the system by default assumes as its beginning date for the new assignment the default date in the overview area via **Settings • Date and Forecast Period** and as its end date 12/31/9999 and does not explicitly ask about the validity period of the new assignment, you should use caution when making organizational changes. Therefore, we recommend that you activate the time period query for organizational changes. The query can be activated via the path **Settings • Period Query for Organizational Changes** (see Figure 2.27).
When the time period query is activated, a transfer is only effective if the beginning date and end date are maintained explicitly (see Figure 2.28).

All actions carried out are kept in memory during maintenance; however, they are not immediately saved in the database. Only when all previously entered information is stored using the SAVE button is the data saved in the database and therefore made available to other applications. You should make a special note of this, particularly when testing the effects of changes in Organizational Management on other applications. Section 2.3.1 explains how you can prompt the system to remind you to save your changes at regular intervals.

Organizational Management, with its associated object types, is vital for the processes of Personnel Planning and Development. Figure 2.29 shows to what extent Organizational Management is integrated into other areas.

Position, job, and often also the organizational unit are the basic objects that can be characterized further with respect to requirements profiles, career paths, employee goals, and so on.
Personnel (Cost) Planning

Positions and jobs serve as input for personnel planning. For example, you can evaluate how many positions are staffed, will be vacant in the future, or become obsolete. Furthermore, for (vacant) positions, target costs can be saved to be able to assign non-staffed positions a value for personnel cost planning.

Demand Planning

Vacant, obsolete, and planned positions are the determining factors for the current number of positions and future needs.

Personnel Development

Requirements profiles that can be saved in positions determine the job descriptions and qualifications for management in Personnel Development.

Talent Management

Objects and stored information from Organizational Management are used within Talent Management. Here, E-Recruiting can be supplied with vacant positions and the respective organizational classification of vacancies, for example. In addition, in SAP Learning Solution, you can determine the required learning of an employee through
a comparison of the requirements profile of his position with his qualification profile and offer corresponding courses (e-learning and/or classroom training). Appraisal criteria can be acquired from positions and jobs as the basis for employee appraisal and position evaluation.

2.2.9 Organizational Management as the Basis for Personnel Administration

Organizational Management is also well-suited for structuring and evaluation in Personnel Administration. To list how Organizational Management functions as a basis for Personnel Administration, the pragmatic use of the following, previously explained objects will suffice:

- Organizational units and their incorporation into the organizational structure
- Positions, their incorporation into the organizational structure, and the assignment of position holders
- Jobs as a means of describing and classifying positions

Organizational Management has an additional meaning in connection with Personnel Administration in the authorization checking of SAP ERP HCM. With activated structural authorization, you can assign users their authorization using their assignment in the organizational structure.

The position linked with the employee in Infotype 0001 (Organizational Assignment) forms the interface between Personnel Administration and Organizational Management. By assigning an employee to a position – and therefore to an organizational unit – his incorporation into the organizational structure occurs. Furthermore, in Infotype 0001, the assignment of the employee to the enterprise structure (personnel area, personnel subarea) and to the personnel structure (employee group, employee subgroup) of a company is made. With active integration, the cost center can be derived from Organizational Management. It can no longer be changed in Infotype 0001.

You can activate the integration of Organizational Management in Personnel Administration in two steps:

1. Set the entry PLOGI-ORGA to “X” via the IMG path PERSONNEL MANAGEMENT • ORGANIZATIONAL MANAGEMENT • INTEGRATION • INTEGRATION WITH PERSONNEL ADMINISTRATION and then using the BASIC SETTINGS action (see Figure 2.30). The table in which the integration is activated also contains other filtering options and is well documented. To reach the documentation of the individual control switches, position the cursor on the entry you want in the column SEM. ABBR. (semantic abbreviation) and click on the DOCUMENTATION button (see Figure 2.30). Frequently, the table is displayed in similar form in the Customizing of Personnel Planning and Development section and will be discussed further.
2. If integration is activated, you must also specify which employees should participate in the integration. Some companies exclude retirees and trainees, for example. This control occurs via the feature PLOGI, which can be reached via the same IMG path. Figure 2.31 shows the integration of all employees.

With active integration, only the position must be maintained in Infotype 0001 “Organizational Assignment.” The fields of the jobs, as well as the organizational unit and cost center, are filled automatically.
responding organizational objects in the structure maintenance, they are maintained using Customizing in simple tables. However, for enterprises with over 1,000 employees, using Organizational Management is urgently recommended because of the additional functionalities.

Another integration aspect is the relationship to Personnel Recruitment, which accesses Organizational Management data via vacant positions. The designation of a position as vacant is acquired in Infotype 1007 “Vacancy.” Therefore, it must also be noted when a position counts as vacant.

Via the IMG path PERSONNEL MANAGEMENT • ORGANIZATIONAL MANAGEMENT • INFOTYPE SETTINGS • ACTIVATE/DEACTIVATE “VACANCY” INFOTYPE, the vacant position is defined using a switch. If the integration of Organizational Management with Personnel Recruitment should be activated, Infotype 1007 (Vacancy) must be activated. For this, the PPVAC entry must be set to “1” (see Figure 2.32). If the integration with Personnel Recruitment is not active, the corresponding entry must be set to “0.” Therefore, each unoccupied position counts as vacant.

Here are a few important notes on integration:

▶ Employees who maintain Personnel Administration and Organizational Management in the system must be aware of the integration aspects and their effects on the work of their respective colleagues.

▶ If you conduct organizational changes to past or previous Organizational Management or Development, these changes can trigger retroactive accounting in the payroll accounting of the affected employee; in fact, rebookings in cost accounting may go back too far in the past, assuming that through the organizational change, the employee’s cost center changes.

▶ The integration into Personnel Recruitment and Personnel Manpower Planning must also be noted because these components refer to the following conditions:

▶ Timely and correct maintenance of vacancies
▶ Limitation of empty positions that should no longer be staffed
▶ Creation and corresponding naming of positions for new employees
Talent management entails the long-term safeguarding of staff assignments for critical positions within the enterprise. This chapter introduces you to talent management and its implementation in SAP ERP HCM.

7 Introduction to Talent Management

In many enterprises, with the implementation of the Personnel Development components of SAP ERP HCM, the Personnel Development processes are comprehensively supported by an IT system for the first time. Often, isolated systems for course organization and individual screens for training data have, thus far, been the only IT support in this area. Therefore, this chapter details the process of IT-supported talent management step by step.

7.1 What is Talent Management?

In recent years, talent management has developed as a reaction to the changing conditions in the search for qualified employees. In the Western industrialized countries, this search has become more difficult due to demographical changes; moreover, the competition for qualified staff has intensified in global markets. Enterprises must make greater efforts to ensure the staffing of critical positions. This requires an active recruitment of employees, retention of employees within the enterprise, and the consistent development of employees with potential.

7.1.1 Defining the Target Groups

At the beginning of the process, you always have to define the target group that is important for the enterprise’s success.

The circles in Figure 7.1 represent employee demand, and the size of the circles correlates with the number of required employees. The employees that are important and necessary for the enterprise have different influence on enterprise success. Depending on the position to be staffed, the demand for employees can be covered more or less easily in the labor market. Within the framework of talent management, a special focus is placed on employees that are success-critical for an enterprise and that are difficult to find in the labor market.
7.12 Areas of Talent Management

There are four areas of activity for Talent Management:

- **Recruitment of employees**
  The enterprise must present itself as an attractive employer and establish relationships with potential talented employees.

- **Identification of talented employees**
  Talented employees and candidates must be identified.

- **Development of employees**
  Challenging tasks must be assigned to employees in a systematic approach. In appraisal interviews, employees must receive feedback on their performance and learning development.

- **Deployment of employees**
  Promising candidates must be deployed systematically; here, succession planning also plays a significant role.

7.13 Design Framework of Talent Management

The implementation of consistent talent management is not just the task of the HR department—especially managers must understand, support, and implement talent management. In this context, it is also necessary to have the support of upper management.
Management
Managers are significant for the successful implementation; they must be committed to talent management.

Organization
The required competencies of the managers must be ensured.

Controlling
Relevant key performance indicators must be specified, for example, the number of high potentials per organizational unit, the number of critical positions that are staffed internally, and the speed of staff assignments for critical functions.

Technology
The process must be supported with suitable information technology.

Culture
Not only the HR department but also the entire enterprise culture must comprehend "talent" as a central factor of enterprise success.

72 Talent Management in SAP ERP HCM

In SAP ERP HCM, Talent Management includes all components that support the described processes of Talent Management. These processes include the following:

E-Recruiting
E-Recruiting not only provides the option to effectively recruit employees via the Internet but also provides management with a pool of candidates with which contact is established, even if no suitable position is currently available. The talent pool can be established with both external applicants and internal employees willing to change their position.

SAP Learning Solution
The SAP Learning Solution provides many options for promoting lifelong learning, along with the ability to record and evaluate learning progress.

Appraisal and Objectives
This component enables an appraisal process that can be designed flexibly. You can map planning meetings, reviews, and appraisals with this component.

Talent Management and Talent Development
With this component, you can implement the core processes of talent management.

Enterprise Compensation Management
The purpose of Enterprise Compensation Management is to plan and implement a compensation policy for retaining employees within the enterprise and simultaneously controlling the associated costs.
The following chapters of this book describe the components of SAP ERP HCM that support talent management in the broader sense. We will first take a look at the Talent Management component.

7.2.1 Parts

The core functions of Talent Management include the following:

Talent Profile

The talent profile contains all relevant information about an employee. In the standard version, you can store information from the categories “Internal Work Experience,” “External Work Experience,” “Education,” “Accomplishments,” “Career Goal,” and “Mobility.” This information can be specified by employees in ESS (see Figure 7.2).

![Talent’s Self Description](image)

**Figure 7.2** Talent Profile in Employee Self-Service (ESS)

In the manager view (see Figure 7.3), you can view this data and define information to assess the potential, performance, or possible career obstacles of an employee.

The short profile shows a selection of data that can be determined in Customizing. This data is used for the talent review meeting, in the search for talent, and for side-by-side comparison.
Talent Groups

The talent group combines talents in freely definable groups, for instance, “membership in a program” or “suitability.” For the talent group, you can define a specific membership period and a processing team. The talent group is stored in Infotype 7420 (Talent Group).

Talent Review Meeting

The talent review meeting is the meeting in which all talents of an area are discussed. All participants can view the specified talents, add new talents if required, compare talents, and change the rating of potential and performance.

Side-by-Side Comparison

In the side-by-side comparison, you can put the short profiles of different talents side by side and compare them.

Succession Planning

Succession planning ensures the staff assignment of the most critical positions within the enterprise. Possible successors are nominated and approved. You can create a
justification for the assignment and determine a ranking. This is determined between the central person and the position using relationship 740 “is successor for/has successor.” Employees that are generally eligible successors for the staff assignments of jobs from one job family can be added to a successor pool. This is done using relationship 744 “has potential for/is potential of” between the central person (CP) and the job family (JF).

Talent Assessment
Talent assessment enables managers to enter data for a talent, including the following:

- Data from Performance Management
- Development plans
- Potential
- Risk
- Derailer
- Competency
- Nomination for talent group

The nomination for talent groups does not require ranking criteria. Rather, it requires a reason that is predefined in Customizing.

Talent Development
You use Talent Development to create and monitor development plans for employees (see Figure 7.4). For example, a development plan is set up for an employee that has been identified as a top talent in the talent review meeting. This development plan describes the development requirement of the employee through appropriate training courses or mentoring. In another case, an employee is identified as a potential successor for a position but still needs to qualify for this position in some areas.

In every development area, you can determine development goals that can either be defined freely or be taken from the qualifications catalog. To achieve these development goals, development measures can be freely defined or taken from the training catalog. The development goals can be traced and can be assigned a percentage that indicates the level of goal achievement.
For the job catalog, the data model of Talent Management has been enhanced with the objects “job family” and “functional scope.” This enables additional structuring of the job catalog (see Figure 7.5). The functional area comprises job families which, in turn, can comprise jobs or positions directly. Qualifications that are assigned to functional areas or job families are inherited to the jobs or positions.
This results in additional structuring options for the job catalog. Previously, the only option was to map job families with the “job” object and assign this job to other jobs.

### 7.2.3 Infotypes

The following section provides you with an overview of the Talent Management infotypes. You cannot process the infotypes directly; they are populated by the application in the background.

- **Organizational Bases and Succession Planning**
  - **7400 (Key Position)**
    In this infotype, you define whether the job or position is a key job or key position. The statuses “Nominated,” “Approved,” or “Rejected” can be stored in the infotype, together with a reason.
  - **7401 (Career Type)**
    In this infotype, you define the career type or career level.

- **Talent Profile**
  - **7402 (Internal Work Experience)**
    Here, you store information about work experience within the enterprise. You can store information such as projects in which the employee was involved, the employee’s role in a project, number of subordinate employees, and other information.
  - **7403 (External Work Experience)**
    Here, you store information on the work experience the employee has gained outside of the enterprise. This includes data such as former employers, industries, number of subordinate employees, functional areas, and hierarchy levels.
  - **7404 (Education)**
    Information on the education (e.g., type of education, field, and degree) are stored in this infotype.
  - **7405 (Accomplishments)**
    You can store special accomplishments—professional or personal (e.g., a special hobby)—in this infotype.
  - **7406 (Mobility)**
    Data on mobility such as willingness to relocate, is stored here.
  - **7407 (Career Goal)**
    Here, you store employee goals, for example career type, career level, or preferred jobs.
  - **7408 (Potential)**
    In this infotype, you store the potential assessment that is made either by the superior or in a talent review meeting. You can determine potential values using scales.
As with potential, performance can also be determined in the talent review meeting (or by the superior on a form) and then stored in this infotype.

**Talent Review Meeting**

**7431 (Talent Review Meeting Basic Data)**
In this infotype, you store the basic data of the talent review meeting for the RM object type (Talent review meeting). This includes the status, title, category, organizational unit that conducts the talent review meeting, as well as language, and deadlines.

**7432 (Assigned Objects)**
Here, you can maintain notes about the talent that are visible during the talent review meeting.

**7433 (Participants)**
Here, the assigned participants are stored.

**7434 (Agenda Topics)**
The agenda topics of the talent review meeting are stored using this infotype.

**7435 (Documents)**
Here, you can store documents referring to agenda topics, including attachments.

**7436 (Dates)**
The date(s) of the talent review meeting are stored using this infotype.

**7437 (Person Responsible)**
Here, information on the support team of the talent review meeting is stored.

**Talent Groups**

**7420 (Talent Group)**
Here, you store basic data on the talent group, including the title and duration for which talents are usually assigned to a talent group.

**7430 (Support Team)**
Here, the support team along with the talent specialists are stored.

### 7.2.4 Prerequisites for Usage

You must install the following components to be able to use Talent Management and Talent Development:

- SAP NetWeaver Portal with the installed Business Packages *Talent Management Specialist 1.41, Manager Self Service 1.41* and *Employee Self Service 1.41*
- SAP NetWeaver Enterprise Search
- Adobe Document Service (ADS), for creating documents for the talent review meeting
Introduction to Talent Management

- SAP NetWeaver Knowledge Provider, for storing attachments and notes on the talent profile, talent review meeting, and talent groups
- SAP Talent Visualization by NAKISA 2.0 (third-party product), for the graphical display of succession planning and job architecture

73 Conclusion

With the new developments in the area of Talent Management, SAP has created new options to manage the processes of Talent Management and Succession Planning via a user-friendly interface. To map similar processes in the “old” personnel development, you usually needed additional developments if you wanted to provide your superior with a user-friendly solution.

Because the component presented here is still new, no empirical values are available. It remains to be seen whether Talent Management can establish itself in real life and can meet the requirements of the broad range of users.

The next chapter describes Skill Management, which supports you in deploying the employees of your enterprise in compliance with their skills. This component forms the basis for personnel development using SAP ERP HCM.
SAP ERP HCM and the topic of “appraisal and objective setting” cover a wide range of functions. Because of this, there is support for a multitude of objective setting and appraisal processes as well as many options for customization.

9 Appraisal and Objectives

Objective settings and appraisals play an essential role in Talent Management. The new component called Appraisal and Objectives (Performance Management) in SAP ERP HCM lets enterprises document and promote the performance of their employees. The following sections provide an overview and indicate the possible uses of the component as well as the integration with other SAP components. The Customizing settings are numerous, ranging from the creation of objective setting and appraisal templates, to the setup and design of processes and forms, to follow-up processing and reporting. This way, you will learn about the individual options of the Appraisal and Objectives component.

9.1 The Process in SAP ERP HCM

The SAP ERP HCM component Appraisal and Objectives enables personnel management to deploy employees in compliance with their skills, develop them in a targeted manner, and pay them based on their performance. Using this component, enterprises can map the entire objective setting and appraisal process individually, and document, design, and trace it in electronic form.

9.1.1 Functional Scope

In principle, the HCM system can map almost every type of objective setting and appraisal. Some possible applications include the following:

- Performance review of individual employees
- Performance review of groups
- Potential appraisal
- Bottom-up appraisal
- 360 degree appraisal
Objective setting
- Reference
- General employee survey
- Survey on satisfaction with the cafeteria
- Documentation of test results
- Business event appraisal
- Attendee appraisal

The system supports not only the simple entry of appraisals but also the entire objective setting and appraisal process from preparation to approval so that the status of the assessment procedure is always known. Moreover, you have access to follow-up tools that cover integration issues and various assessments. If the process is not mapped in the system in its entirety, you can print appraisal templates and later centrally enter the data from the templates.

9.1.2 Appraisal and Objective Setting Process

The goal of appraisal and objective setting is to support employees and improve their performance and efficiency by informing them about the performances and activities expected of them. The process of appraisal and objective setting varies depending on the form (e.g., objective setting, appraisal, and 360 degree appraisal), type (e.g., individual or multisource appraisal, and anonymous appraisal), or application area (e.g., employee appraisal, instructor appraisal, and supervisor appraisal). The following sections describe the essential process phases.

Preparation

The preparatory phase is of a technical nature and establishes the basic requirements for upcoming objective setting and appraisal meetings (see Figure 9.1). The operations required here can be implemented either by the responsible HR administrator or by the manager of the employee to be considered.

You determine the basic conditions of appraisal or objective setting in the appraisal template. Different templates may be available, for example, based on contents (appraisal, objective setting, or both) or pay-scale commitment (pay-scale and non-pay-scale employees).

In addition to selecting the template, in the preparatory phase you also assign the persons participating in the process (appraiser, appraisee, part appraiser, and other persons) and determine the appraisal and objective setting period in question.
Objectives are to be set

Define appraiser  
Define weighting of appraisal  
Select person to be appraised  
Select form  

Preparation finished

Figure 9.1 Preparatory Process

If all information is available, the appraisal and objective setting meeting is created in the system and is then available to the employee and manager.

Objective Setting

After the templates have been created in the preparatory phase, the manager and employee make an appointment for the planning meeting in the objective setting (see Figure 9.2). Because the objective setting meeting considers a period of time in the future, the employee and the manager usually hold the planning meeting at the beginning of the specified appraisal period. In this meeting, the qualifications required and the competencies of the employee are identified and the objectives and tasks are set. Moreover, they can discuss the course and training requirements of the employee and add them to the objective setting.

The objective setting meeting can be implemented directly in the system so that the agreements can be entered in the system during the meeting. If this is not requested, you can also print the objective setting. The agreements made are then written down on paper and subsequently entered in the system by the employee or the manager.
Review

The agreements made at the beginning of the appraisal period are based, among other things, on assumptions on the applicable business terms and conditions, business dependencies, and conditions for the period in question. If these assumptions change, the agreements must be revised.

A review (interim meeting) within the appraisal period enables the employee and manager to check the agreements and adapt them to current conditions, if required.
The review enables initial comparisons of previous objectives and current performance. The manager and the employee discuss whether the agreements that were set in the planning phase are still relevant, add agreements if required, or decide on canceling obsolete agreements. Moreover, necessary measures can be agreed on in the review that support the employee in achieving the objectives.

As with objective setting (see Figure 9.2), the review meeting can be implemented directly in the system or on paper.

**Achievement of Objective/Appraisal**
Objective or appraisal achievement enables the manager to document the employee’s performances, qualifications, and developments. The manager and the employee discuss the degree of achievement for the agreements set and consider the previous period. In doing so, they check and rate the development of qualifications and competencies, the overall performance, and the implementation of the employee’s specific tasks and objectives.

Moreover, they can identify areas for action for additional training or an overfulfillment in different areas.

**Approval**
If the objective setting review or objective achievement meeting data is agreed on and entered into the system at different points in time, some customers use an additional approval step (see Figure 9.3). For example, if the employee enters the agreed on data of his objective setting after the objective setting meeting, the manager can verify the data via an approval step. In this step, it is confirmed that the data entered corresponds to the agreed on data.

If the data does not correspond to the agreements, the employee can correct his input errors and again finish the objective setting. If the manager and the employee disagree regarding the content, this can be clarified in another meeting.

The decision for or against an approval step in the phases of objective setting, review, and achievement of objective depends on the effects and weighting of the objective setting as well as the company culture, among other things. For example, if the objective setting directly affects the salary of the employee, an approval step is frequently implemented in all process phases.

However, the confirmation of the objective setting that is achieved this way is legally not identical to a digital signature. For this reason, some customers continue to use the handwritten signatures of employee and manager.
Follow-Up Processing

Follow-up processing starts immediately after the appraisal and objective setting have been completed (see Figure 9.4). At this point, the data entered is reconciled, can no longer be changed, and can be further processed. The qualifications of the employee can be copied to his profile. Agreed on events are booked via Training and Event Management. For recurring objective settings and appraisals, a new document is created in which the objective setting can be entered. Provided that the objective settings and appraisals have monetary effects, you can transfer the corresponding data to Compensation Management. Aside from automatic subsequent processing, evaluations are another focus area of follow-up processing.
9.1.3 Integration
The Appraisal and Objectives component has multiple integration points with other components of the HCM system (see Figure 9.5). Some of these components are prerequisites for successful use of objective settings and appraisals; others are not necessarily required but are still frequently used. The following sections describe the different components in detail.
Organizational Management

Current data in Organizational Management is a basic prerequisite for using the Appraisal and Objectives component without issues. Data such as the determination of an employee's superior plays a central role in the generation and access to objective setting templates. Moreover, evaluations and other standard programs are based on the organizational structure.

Personnel Administration

Personnel Administration provides the required employee data (personnel number, name of the employee, etc.) and is therefore mandatory.

Personnel Development

The integration of the Personnel Development component enables you to transfer requirements profiles from positions or qualifications from the qualifications catalog to the employee's individual objective setting. After the objective setting and the appraisal, the system can automatically transfer the agreed on qualifications and measures to the employee's profile.

The objective settings and appraisals can also be used as decision support for internal applicants in E-Recruiting or for succession planning (see Chapter 11, SAP E-Recruiting).

Compensation Management

Some enterprises integrate financial incentive systems with the objective settings and appraisals. This “pay for performance” philosophy can be implemented via a connection to Compensation Management.

Through the integration with Compensation Management, you can automatically accept proposals for compensation adjustment when the appraisal and objective setting cycle has been concluded. These proposals can be determined in a differentiated manner for overall appraisal, for groupings of specific objectives, or for individual objectives.

Using Compensation Management is not mandatory for the payment of bonuses. The transfer to Payroll Accounting can be implemented differently. For this purpose, you can use the BAdI HRHAP00_FOLLOW_UP_, for example.

Training and Event Management

Integration with Training and Event Management arises because Training and Event Management also uses appraisals with models that are maintained in the same catalog and that use the same scales as the Appraisal and Objectives component.
SAP Learning Solution (LSO)
By integrating SAP Learning Solution, you can integrate the educational management processes with objective setting and appraisal. Employees and managers can discuss and book training activities for employees in objective setting meetings.

SAP NetWeaver Business Warehouse (BW)
SAP NetWeaver Business Warehouse (BW) provides additional evaluations and analyses. These include, among others, status tracking, calculations of averages, and cross-objective setting comparisons.

SAP Strategic Enterprise Management (SEM)
By integrating with SAP Strategic Enterprise Management (SEM), you can derive departmental objectives from superordinate enterprise objectives and display them in the Balanced Scorecard. These relevant strategic objectives can be copied directly to the objective settings for the employee.

9.2 Implementation in SAP ERP HCM
This section focuses on the description of the Customizing activities, including the maintenance of the catalog for appraisal templates.

9.2.1 Basic Customizing Settings
This section describes the use of the preliminary system configuration that is required for using the Appraisal and Objectives component. You must by all means ensure that the following steps are completed before you start the Customizing.

Replace Old Appraisal System with New
Table T77S0 contains a critical switch (see Figure 9.6), the HAP00/REPLA switch. It controls whether the old or the new appraisal system is used. You can maintain this switch either via the PERSONNEL MANAGEMENT • PERSONNEL DEVELOPMENT • OBJECTIVE SETTINGS AND APPRAISALS • EDIT BASIC SETTINGS IMG path or directly via Transaction OOHAP_SETTINGS_PA.

To replace the old Appraisals Systems component with the new Appraisal and Objectives component, the switch must have the value A. This replacement affects the Personnel Development and Training Management components of SAP Learning Solution. A replacement that only affects one of the two components is not possible.
Index

360 degree appraisal, 207

A

Account assignment, 81
Account assignment features, 49
Ad-hoc Query, 155, 161
Administrator Workbench, 492
Advertising
  External, 367
AIDA principle, 367
Analysis Toolbox, 499
Applicant preselection, 371
Applicant Tracking, 424
Application, 395
  Process, 369
  Status, 370
Appointment calendar, 286
Appraisal, 35, 207, 323, 324
Appraisal and Objectives, 26, 169, 207
Appraisal and objective setting process
  Achievement of objective/appraisal, 211
  Approval, 211
  Follow-up processing, 212
  Objective setting, 209
  Preparatory phase, 208
  Review, 210
Appraisal scale → Scale, 179
Appraisal template, 217, 247
  Catalog, 217
Attendance menu, 269
Attendee appraisal, 208, 323
Attendee type control, 314
Authoring Environment, 331
Authority, 459, 539

Authorization, 114, 156, 157, 252
  Context-dependent, 135
  Structural, 50, 227
Authorization administration, 50
Authorization check
  Context-dependent, 135
  Structural, 123, 127
Authorization concept, 118, 137, 157
Authorization level, 120
Authorization main switch
  AUTSW – ADAYS, 130
  AUTSW – DFCON, 136
  AUTSW – INCON, 136
  AUTSW – NNCON, 136
  AUTSW – NNNNN, 133
  AUTSW – ORGPD, 128, 136
  AUTSW – XXCON, 136
  AUTSW-ORGPD, 123
Authorization main switches, 120, 136
Authorization object, 114, 118, 119
  P_ABAP, 122, 123, 134
  PLOG, 119
  P_ORGIN, 120, 122
  P_ORGINCON, 135
  P_ORGXX, 122
  P_ORGXXCON, 135
  P_PERNR, 121, 122, 133
  P_TCODE, 119
  S_TCODE, 119
Authorization Object
  P_ORGIN, 132
Authorization profile, 114, 118
Authorization, 114

B

BAAdI
  HRHAP00_ADD_HEADER, 223
Index

HRHAP00_BSP_TMPL, 223
HRHAP00_BUT_ACCESS, 228
HRHAP00_COL_ACCESS, 228
HRHAP00_DOC_BC, 228
HRHAP00_DOC_PREPARE, 239, 240
HRHAP00_ENHANCE_FREE, 237
HRHAP00_FOLLOW_UP_, 214
HRHAP00_LINK, 224
HRHAP00_REPORTING, 242
HRHAP00_SAMRTFORM, 223
HRHAP00_VAL_DET, 233
HRHAP_FOLLOW_UP, 229
HRHAP_FOLLOW_UP_D, 229
HRHAP_OFFLINE, 223
HRHAP_REPORTING, 244
HRPAD00AUTH_CHECK, 133
HRPDU00APPRaisal0000, 216
LSO_CANCELREASONS_C, 285
LSO_LEARNER, 351
Balanced Scorecard (BSC), 215, 515
Basel II, 366
Benchmarking, 27
Benefits, 27
BEx Analyzer, 499
BEx Query Designer, 494, 495
BEx Web Application Designer, 503
Billing and allocation of course costs, 325
Blended learning, 256, 302
Booking priority, 312
Bottom-up appraisal, 207
BSP, 237, 427
BSP application
  HAP_CALIBRATION, 244, 245
  HAP_DOCUMENT_PA, 237
Budget, 447
Budgeting, 431, 435, 509
Business area strategy, 513
Business Consolidation (SEM-BCS), 515
Business Content, 491
Business development, 449
Business event, 266
Business event appraisal, 208
Business event catalog , 266
Business event group, 265
Business event menu, 269
Business event type, 265
Business Object Repository (BOR), 149
Business Package, 142
Business Planning und Simulation (SEM-BPS), 515
Business process, 183

C

Calculated key figures, 498
Calibration Grid, 508
Calibration Tool, 244, 245
Cancellation fee, 315
Cancellation reason, 315
Candidacy, 395
Candidate, 394
Capacity, 181, 442
Capacity adjustment, 448
Capacity demands, 453
Capacity planning, 186, 442
  Project-based, 26, 27
Capacity risk, 450
Career, 36
Career path, 36, 365, 366
Career paths, 35
Career planning, 26, 199
Careers, 35
Cascade goals, 248
Category, 219
Category group, 217
Cause-effect chain, 516
Central User Administration (CUA), 141
Characteristic
  HCP01, 482
  HCP02, 482
  HCP03, 485
Characteristics, 493
Charcteristic value, 190
Chief position, 43
Collective wage agreement, 444
Company instructions, 184
Company pension scheme, 27
Comparability, 204
Compensation, 249
Compensation Administration, 431, 432, 509
Compensation management, 26
Compensation Management, 214
Compensation plan, 468
Compensation planning, 443, 452
Compensation policy, 443
Compensation program grouping, 432
Compensation risk, 451
Competition strategy, 513
Composite role, 112
Concurrent employment, 344
Contingency planning, 456
Controlling, 278
Controlling area, 49
Corporate function, 184
Correspondence
  SAP Learning Solution, 321
  Training and Event Management, 320
Cost center, 49
Cost item, 467
Cost of staff turnover, 376
Cost per hire, 376
Cost planning, 26, 452
Cost planning run, 467, 470
Cost risk, 450
Costs of the work place and its equipment, 444
Course, 266
  Create, 298
Course appraisal, 323, 324
Course catalog, 251, 264, 266
Course costs, 281
Course date, 266
Course group, 265
Course hierarchy, 265
Course menu, 269
Course type, 265
  Create, 290
Curriculum, 266, 302, 314
Curriculum type, 266
Customer relationship management, 375

D
Data collection, 467
Data dictionary structure (DDIC), 91
Decentralized approach, 180
Decentralized cost planning, 467
Decentral variant, 204
Default profile, 126
Default work area, 155
Delimit, 32
Deployment planning for the retail industry, 26
Depreciation, 181
Design Toolbox, 500
Detail maintenance, 46
Determining demands, 442
Development of managers, 203
Development planning, 26
Dimension, 493
Dimension table, 493
Dislikes, 182
Division matrix, 77
Documentation of test results, 208
Double verification principle, 121
DSO object
  OECM_DS01 (Employee Pay Categories), 509
  OECM_DS02 (Combined Market Data), 509
  OECM_DS04 (Compensation Budget), 509
  OECM_DS05 (Raw Market Data Survey), 509
  OECM_DS06 (Job Assignment), 509
  OECM_DS08 (Actual and Planned Salary Structure), 509
Index

OEPCM_DS09 (Salary Structure of the Jobs), 509
OEERC_DS01 (Requisition Support Team), 511
OEERC_DS02 (Application Support Team), 511
OEERC_DS03 (Qualifications), 511
OEERC_DS04 (Talent Group Assignment _ Candidate), 511
OPPAH_DS01 (Appraiser per Document), 507
OPPAH_DS02 (Appraisee per Document), 507
OPPAH_DS03 (Appraisals), 507
OPPAH_DS04 (Appraised Employees per Document), 507
OTM_DS01 (Staffing Assignment), 510
DSO object
OEPCM_DS03 (Compensation Administration), 509
Duplicate applications, 370
Dynamic email, 326
Dynamic menu, 267
Dynpro, 89
Sample process, 348
Strategic importance, 261
Virtual classroom, 256
Web Based Training (WBT) (online), 257
Whiteboard, 256
Employee appraisal, 180
Employers
Other/previous, 184
End-User Delivery, 25
Enhancement Package 4, 246
Enhancement Package 4, 342, 378, 428
Enterprise compensation management, 169
Enterprise Compensation Management, 431, 508
Enterprise goal, 248
Enterprise strategy, 445, 449, 464, 513
E-Recruiting, 43, 62, 81, 365, 511
Manager, 414
Recruiter, 416
Roles, 402
Succession planner, 421
ESS, 121, 139, 143, 178, 202, 432, 447, 451
in Training and Event Management, 326
Evaluation path, 47, 82, 123, 465
ORGCHART, 123
Event, 150
Event linkage, 149
Excel file, 492
Excel inplace, 57
Exception, 499
External database, 492
Extractor, 491

E

E-courses, 266
Education, 184
Education and training, 26
costs, 444
E-learning, 255
Advantages, 260
Blended learning, 257
Business TV, 256
Computer-Based Training (CBT) (offline), 256
Computer Supported Cooperative Learning (CSCL), 256
Learning communities, 256
Microlearning, 257
prerequisites, 258

F

Fact table, 493
Favorites list, 410
Field group, 155, 160
Follow-up processing of courses, 296, 297, 322
Free search, 31
FTE, 462, 463
FTE, 384
Full-time, 455
Function module
   RH_GET_MANAGER_ASSIGNMENT, 125
   RH_GET_ORG_ASSIGNMENT, 125
Functional strategy, 513
Further education, 255

G
General employee survey, 208
German Federal Ministry of Education and Research (BMBF), 329
Global employee, 344
Global work area, 155
Grid control, 57

H
Headhunting, 368
History tracking, 323

I
IAS/IFRS, 515
Identity Management, 141
InfoCube, 493
   OECM_C01 (LTI Granting), 509
   OLSO_C01 (Training Management), 507
   OPA_C01 (Headcount and Personnel Actions), 505
   OPA_C03 (HR Benchmarks), 505
   OPAC_M01 (Planned/Actual Comparison for Personnel Costs), 506
   OPACP_C01 (Personnel Cost Plans), 506
   OPACP_C02 (Planned Personnel Costs per Cost Object), 506
   OPaos_C01 (Staffing of Positions), 505
   OPAPOD_C01 (Qualifications), 506
   OPE_C01 (Training and Event Management), 505, 507
   OPT_C01 (Time and Labor Data), 505
   OPY_PPC01 (Revision Info), 506
   OSCP_ISO1 (Successor and Occupant of the Key Position), 510
   OTM_C01 (Staffing Assignment), 510
   InfoObject, 492, 493
   InfoProvider, 492
   Information menu, 269
   Infoset, 155
   Infotype, 28, 29, 37, 59, 90, 158, 457
   0761 (LTI Granting), 509
   0762 (LTI Exercising), 509
   0008 (Basic Pay), 468
   0014 (Recurring Payments/Deductions), 468
   0015 (Additional Payments), 468
   0105 (Communication), 116, 117
   0666 (Planning of Personnel Costs), 468
   0758 (Compensation Program), 432
   0759 (Compensation Process), 432
   0760 (Eligibility Override), 432
   0761 (LTI Grant), 434
   0762 (LTI Exercising), 434
   0763 (Participant Data), 434
   1000 (Object), 291
   1001 (Relationships), 294
   1002 (Verbal Description), 291
   1021 (Prices), 293
   1024 (Capacity), 293
   1025 (Deprec. Meter/Validity), 297
   1029 (Course Type Info), 294
   1030 (Procedure), 297
Index

1036 (Costs), 293, 297
1037 (Billing/Allocation Info), 297
1042 (Schedule Model), 291, 293
1060 (Business Event Demand), 297
7420 (Talent Group), 171
Basic functions of working with infotypes, 31
Subtypes, 38
Inheritance, 49, 182
Inheritance principle, 82
Integration, 27, 33, 184, 186, 466
Internet, 368
Intranet, 367
iView, 142

Labor market, 464
Labor turnover, 444
LDAP directory, 141
Learning management system (LMS), 262
Learning object, 331
reference, 332
Learning on demand, 255
Level increase, 443
Lifelong learning, 255
Line managers, 204
List acquisition, 32
List viewer, 160
Lock, 32
Logical database, 156
PCH, 156
PNP, 156
PNPCE, 156
Long-Term Incentives (LTI), 431, 434, 509

Management, 447, 451, 463
Management Cockpit, 516, 517
Management of international employees, 27
Manager's Desktop <Pfeil>R<normal>
MSS, 198
Mandatory qualifications, 196
Mandatory relationship, 84
Markoff analysis, 443
Master data catalog, 271, 288
Master data maintenance, 29
Matchcode, 31
Materials Management, 276
Matrix organization, 77
Matrix type, 77
Matrix view, 80
Measure Builder, 516
MetaData Repository, 494
Model functional building blocks, 94
Motivation risk, 451

Key figure, 493, 494
Key figure procedures, 442
Key Position, 397
Knowledge Management, 141
Knowledge Warehouse, 273

L3 Lifelong Learning, 329

L

558
Index

MSS, 139, 144, 198, 202, 451
MultiCube, 492

*OTM_MP01 (Talent Management), 510*
Multisession course/convention, 301

N

Need

  Qualitative, 36
  Quantitative, 36
Need for qualifications, 35
N.N. booking, 312
Normal booking, 312
Number assignment, 40
  External, 40
  Internal, 40
  Plan version-independent, 40
Number range, 39
Number range interval, 39

O

Objective setting, 207
Objective setting and appraisal
  Participant, 220
  Task selection, 247
Objective Setting and Appraisal, 508
Object manager, 29
Object type, 42, 48, 88, 92, 103, 394, 457
Obsolete, 538
Offline-Content Player, 344
Online application, 373, 374
Organizational Management, 27, 28, 35, 115, 152, 184, 214, 273, 453, 505
  Role Assignment, 117
Organizational structure, 48, 66
Organizational theory, 35
Organizational unit, 33, 42, 469
Organization plan, 102
Overqualification, 186

P

Part-time, 455
Payroll, 27
Payroll results, 468
Pay-scale commitment, 208
Performance Management Appraisal and objectives, 26
Performance Measurement (SEM-PM), 516
Performance review, 207
Performance review with employees, 447
Personalization, 111, 112
Personnel action, 37, 289
Personnel Administration, 27, 28, 184, 273
Personnel controlling, 445
Personnel cost planning, 443
Personnel Cost Planning, 456, 506
Personnel Cost Planning and Simulation, 467
Personnel deployment planning, 186
Personnel Development, 214, 506
Personnel development planning, 445
Personnel master data, 27, 184
Personnel number, 28, 31
Personnel planning, 27
Personnel strategy, 448
Planned compensation, 81
Planning and simulation of personnel costs, 27
Planning context, 469
Planning menu, 270
Planning preparation, 469
Planning process, 445
Plan version, 36, 98
  Current, 36
PLOGI, 34, 64
Position, 33, 43, 181, 453, 454, 469
  Description, 539
  Obsolete, 454, 458, 462

559
Vacancy, 453
Vacant, 458, 461
Position description, 537, 538
Posting, 395
Potential, 182
Potential appraisal, 207
Power of attorney, 459
Preferences, 182
Preselection, 371
Print Workbench, 320
Process analysis, 27
Processes and forms, 27
Process examples, 545
Processor search, 152
Proficiency description, 190
Profile, 181
Profile Generator, 115, 119, 117
Profile maintenance, 194
Profile matchup, 196, 251
Profile view, 187
Program
MPPAUTZZ, 132
Projection of personnel costs, 449

Q

Qualification, 44, 177, 237
Qualification group, 177, 191
Qualifications catalog, 177, 178, 190
Qualifications profile, 35
Quality assurance, 448
Quality scales, 179, 190
Quantity scales, 179
Query, 155
Questionnaire, 388, 427
Quota planning, 462

R

Reassignment to wage group, 444
Recruitment, 365, 458
Recruitment controlling, 372
Recruitment costs, 444
Recruitment media, 366
Recruitment planning, 445
Recruitment process, 365
Recruitment service providing, 377
Redundancy costs, 444
Reference, 208
Relationship, 42, 48, 119
Maintain, 88
Relationship type, 457, 465
Remote Function Call (RFC), 142
Remuneration element, 468
Reorganization, 444
Report
Attendance Prerequisites, 318
Attendee's Training History, 317
MPPAUTZZ, 132
Prerequisites Matchup, 318
RHAKTI00, 46
RHAUTH00, 125
RHBEGDAO, 67
RHCOPL00, 99
RHCOPLPT, 99
RHECM_BUDGET_RPT, 436
RHECM_CREATE_COMP_PROCESS, 432
RHHCP_DC_EMPLOYEE, 474
RHHCP_DC_ORGOBJECT, 478
RMOVE30, 105
RHPROFL0, 52
RHXIAW04, 51
RHXIAW05, 51
RPUCG00, 132
Reporting, 242
Analysis, 244
Export to Excel, 243
Print, 243
Ranking list, 242
Request-based correspondence, 321
Required business event, 340
Requirement planning, 452
Requirements profile, 35
Requisition, 382, 394
Requisition management, 380, 427
Researchers, 368
Resource and program management, 26, 27
Resource menu, 270, 271
Resources, 459, 539
Resource type, 266
Restrictions, 458
Retirement pension plan, 450
Risk management, 450, 463, 515
Role, 111, 451
  Concept, 50, 52
  Resolution, 152
  Structure, 112
Role concept, 111
Room Reservation Management, 270
Routing structure, 152
Runtime system, 148

S
Salary adjustment, 443
Salary planning, 250
Sales & Distribution, 272
SAP Business Suite, 23, 24
SAP Business Workflow, 147
  Controlling complex processes, 148
  Controlling individual processes, 148
  Controlling information flows, 147
SAP Customer Relationship Management (CRM), 24
SAP Enterprise Learning, 342
SAP E-Recruiting, 169
  Administrator, 420
  Customizing, 422
  External candidate, 402
  Internal candidate, 414
  Roles in, 402
SAP ERP, 23
SAP ERP Corporate Services, 23
SAP ERP Financials, 23
SAP ERP HCM Extensions, 468
SAP ERP Human Capital Management (HCM), 23, 26
  Integration with other components, 25
SAP ERP Operations, 23, 186
SAP Learning Solution, 169, 255, 507
  Correspondence, 321
  Integration, 338
  Roles, 330
SAP Learning Solution, 215
SAP memory, 127
SAP NetWeaver, 23
SAP NetWeaver Application Server (AS), 23
SAP NetWeaver Business Warehouse (BW), 23, 215, 242, 491, 517
  Extraction layer, 491
  Modeling layer, 491
  Reporting and analysis layer, 491
SAP NetWeaver Portal, 24, 139, 502
  Content area, 142
  Header area, 141
  Navigation panel, 142
  Reporting, 144
SAP NetWeaver Process Integration (PI), 24
SAP Note
  339367, 128
  953254, 326
  953832, 27, 263, 326
SAP Product Lifecycle Management (PLM), 24
SAP Query, 155, 159
SAP R/3, 23
SAPscript, 320
SAP Solution Map, 24
SAP Strategic Enterprise Management (SEM), 215, 452, 513
SAP Supplier Relationship Management (SRM), 24
SAP Supply Chain Management (SCM), 24
Index

Scale, 179, 190
Scale value <Pfeil>R<normal> characteristic, 190
School-grade scale, 179
SCORM (Shareable Content Object Reference Model), 262, 331
Search and Classification Engine, 428
Search help, 31
Search tools for objects
  Free search, 55
  Search term, 55
  Structure search, 55
Search variants, 56
Selection process, 372
Self-directed, 256
Self-directed learning, 256
Setting objectives, 207
Shift planning, 452
Short-term manpower planning, 442
Side-by-side comparison, 171
Single role, 112
Single sign-on (SSO), 140
Skill management, 177
Smart Forms, 427
Soft skill, 35
Soft Skill, 179
Split-screen technology, 53
Staff assignments, 460
Staff Assignments, 460
Staff function, 538
Staffing assignment, 537
Staffing assignments, 449
Staffing percentage, 460
Stakeholder, 517
Stakeholder Relationship Management (SEM-SRM), 517
Standard task, 44
Star schema, 493
Star scheme, 493
Start object, 47, 54
Status administration, 46
Strategy Management (SEM-SM), 515
Structure graphic, 102
Subgroup, 40
  Wildcard, 41
Sub-plan, 448
Subprofile, 182, 187
Substitute qualification, 181, 187, 191
Subtypes, 37
Succession planning, 26, 36, 171, 199, 365, 366, 378, 380, 396, 421
Succession Planning Monitor, 511
Support team, 384
Switch
  HRLSO WFSTO, 282, 285
  PLOGI, 33, 63
  PLOGI QUALI, 277
  SEMIN CCDEL, 285
  SEMIN INPRI, 283
  WORKF ACTIV, 282
SWITCH
  PLOGI, 273
Symbolic account, 468
System dynamics, 443

T

Table
  EX_CITEMS, 477
  EX_DIFFCA, 477
  IM_PERNRTAB, 477
  LSOWF_CUSTOMIZE, 283
  T77EO, 85
  T77ITEX, 71
  T77OS, 85
  T77SO, 85
  T77PR, 124, 125, 126, 128, 135
  T77SO, 85
  T77UA, 124, 126, 128, 135, 136
  T7771, 92
  T777O, 84
  T582A, 130
  T591A, 130
Table control, 103
Tab pages, 93, 95
Tab strips, 58
Talent assessment, 172
Talent development, 172
Talent group, 171, 394
Talent Management, 25, 26, 27, 167
   Data model, 173
   Deployment of employees, 168
   Development of employees, 168
   Enhanced job architecture, 173
   Four areas of activity, 168
   Identification of talented employees, 168
   Infotype, 174
   Recruitment of employees, 168
   Technical prerequisite, 175
Talent pool, 375, 394
Talent Pool, 400
Talent profile, 170
Talent relationship management, 374
Talent review meeting, 171, 401
Talent warehouse, 423
Task, 44, 181
   Catalog, 50, 51
   Change, 463
Teaching hours, 460
Team calibration, 249
Team goal, 248
Technical characteristic, 494
Temporary or contract personnel, 368
Test procedures, 130
Threshold value, 498
Time characteristic, 494
Time constraint, 38
   Type, 38
Time Management, 27, 273
Time to fill, 376
To-do list, 324
Tool menu, 270
Total compensation, 443
Traffic generator, 373

Training and Event Management, 185,
   214, 255, 507
   Book, 311
   Budgeting, 302
   Cancel, 311
   Concept, 263
   Correspondence, 320
   Costing, 310
   Daily activities, 311
   Demand planning, 304
   Design, 338
   Follow-up actions, 277
   Integration, 272
   Material planning, 309
   Prebook list, 315
   Rebook, 311
   Resource planning, 307
   Sharing information, 316
   Structure, 264
   Waiting list, 315
Training catalog, 288
Training recommendation, 197
Transaction, 119
   OOHAP_SETTINGS_P, 215
   PHAP_ADMIN_PA, 216
   PHAP_CATALOG, 217
   PHAP_CATALOG_PA, 216
   PHAP_CHANGE_, 216
   PHAP_CREATE_, 216
   PHAP_PREPARE, 239, 240
   PHAP_PREPARE_PA, 216
   PHAP_SEARCH, 242, 244
   PHAP_SEARCH_PA, 216
   PHCPADMIN, 480
   PPCI, 91, 92
   PPOME, 95, 462
   SE11, 91
   SFW5, 428
   SLG1, 228
   SM31, 82
   SU21, 132
Transfer of qualifications, 278
Index

Translation, 193
Transport connection, 105
Travel expenses, 445
Travel planning, 445
Tree graphic, 48

U

Unit, 494
Unlock, 32
User assignment, 112
User data, 115
User group, 156
User management, 140
US-GAAP, 515

V

Vacancy, 81, 538
Validity of qualifications, 181
Value scale, 190

W

War for Talent, 375
Web 2.0, 257
Web-Based Training (WBT), 302
Web Dynpro ABAP, 247, 427
Work center, 44, 181
Workflow, 50, 281
  Approve Employee's Attendance Booking (LSO_APPROVE), 282
  Approve Employee's Attendance Cancellation, 285
  Correspondence Error Handling (ERROR PD-SCM), 282
Workflow Builder, 148, 149
Workflow container, 150
Workflow Definition, 150
Workflow template, 149, 151
Workforce Deployment, 25, 26, 27
Workforce Planning and Analytics, 25
Workforce Process Management, 25, 27
Work hours, 454
Working hours, 460