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In today’s economy, adhering to compensation budgets dictated by management has become especially important. Keeping to budgets for compensation matters is certainly easier said than done however, but by implementing the budgeting functionality available within SAP ERP HCM ECM you can achieve higher compliance. This chapter provides an overview of the budgeting functionality and how to use it. We will also explore some of the more popular budgeting topics including enhancements and Best Practices.

4 Compensation Budgeting

The topic of budgeting within ECM is one of the most important because compliance to a set budget is often mandated from a company’s board or compensation committee. Adherence to budgets becomes a critical piece of financial viability for many companies, especially in harder economic times. This chapter provides a comprehensive review of the standard compensation budgeting functionality available in ECM. After providing an overview of the functionality, we will dive deep into the budgeting life cycle — the key steps from inception to closure — that are experienced when administering compensation management budgeting within the system. We will also explore some of the available enhancements for the functionality, and some Best Practices you can benefit from.

Let’s start with an overview of what budgeting is and how it’s used within ECM.

4.1 Budgeting Overview

Compensation budgeting functionality starts with a firm understanding of the organizational hierarchy in the Organizational Management (OM) component of SAP ERP HCM. This is because SAP manages compensation budgets based on budget units that form a hierarchy that directly mimics the organizational structure. The budget unit (object type BU) is an organizational management object that is created during the budgeting process. It is associated to an organizational unit via
a standard OM relationship. The *budget hierarchy* itself (i.e., the roll-up of budget units) is formed based on the organizational structure. After creation, there is a one-to-one correlation between a budget unit and an organizational unit. Like organizational units, budget units report up to other budget units. This forms a hierarchy called the *budget structure*, which is why the official name for the budget unit object is actually *budget structure element*.

As with many concepts within OM, the concept of inheritance plays a key role in the functionality. Budget units contain and fund subordinate (lower-level) budget units. This way, budgets can be accounted for both from an individual and roll-up perspective. This makes reporting against these budget units more robust because a snapshot of a budget can be retrieved for the manager’s own organizational unit and for that same manager's entire span of control (i.e., the manager’s own organizational unit and all subordinate organizational units).

Budgets can be used to track both monetary funds and nonmonetary pools. Monetary budgets hold value and are currency dependent (e.g., dollars, Euros, etc.). Merit budgets, for example, would be considered a monetary budget because they are based on value (e.g., increases to base pay). A non–monetary budget, however, contains units and not value. Examples include restricted stock and stock options. Non–monetary budgets need to specify the relevant stock unit (i.e., stock ticker) applicable to the funding. However, only one stock type can be used within the budgets funding (i.e., you cannot mix options and shares together in one pool).

Each budget is tied to at least one compensation plan. Although two plans (such as a merit plan and lump-sum payment plan) can be tied to the same budget, typically there is a one-to-one mapping between a plan and a budget. The link is done at the compensation review item level on its attributes within the configuration. Linking budgets to compensation review items is explained in detail in Chapter 5, Process Administration.

The budgeting process itself can be represented in a sequential fashion, and can be implemented and managed in a systematized and methodical manner if the order of execution is known and prepped for. So let’s discuss the budgeting life cycle and highlight the steps within the process in detail.
4.2 Life Cycle

The budgeting life cycle follows a four-step process from inception until closure. Managing your compensation budgeting process using the procedures specified within the life cycle will help arm your implementation team and compensation department with the knowledge needed to effectively complete the process. The four-step process includes the following steps:

- Preparation
- Initialization
- Maintenance
- Closure

Figure 4.1 shows the budgeting life cycle within SAP ERP HCM ECM.

Let’s discuss each step in this process beginning with the preparation step.

4.2.1 Preparation

Budget preparation involves the creation of the initial budget structure based on the organizational hierarchy. Before preparing the budget, an up-to-date organizational structure is critical. There are two ways to create the initial budget structure. In both ways, the budget structure is created without any funding. In other words, during the preparation step, only the budget structure is created but no budget is funded for any budget units. This comes in the next step of the process.
Note

It is a good idea to involve your Human Resources (HR) department in the timing of your budget structure creation. Before creating your budget structure, an attempt should be made at ensuring the organizational structure is as current as possible. This especially includes major reorganizations that could affect the creation of new organizational units or the reassignment of existing organizational units. Processing these updates before budget creation time provides a more accurate budget structure once planning starts. Careful consideration should be made to include any major restructuring during the planning process. We will cover the topic of on-cycle employee movement later in this chapter.

To create a "shell" budget structure, navigate to Transaction PECM_GENERATE_BUDGET from the Easy Access page via the path: Human Resources • Personnel Management • Compensation management • Enterprise Compensation Management • Budgeting • Generate Budget from Organizational Hierarchy.

The use of Transaction PECM_GENERATE_BUDGET is a one-time event during the preparation step. Figure 4.2 shows the selection screen of the transaction with selection criteria Budget Type and Budget Period in the selection labelled Budget Selection. In this area, you provide both the budget type and budget period you want to create your budget structure against. Example values for Budget Types include Salary Increase, Bonus budget, and Long-term Incentive (LTI) budget. Example values for Budget periods include 2009, 2010, 2011, etc. The meanings behind budget type and budget period are described in detail in Section 4.5, Configuration.

![Figure 4.2 Selection Screen for Transaction PECM_GENERATE_BUDGET](image-url)
The next section of the selection screen, Organizational Structure, requires specifying a top-node organizational unit. This is the organizational unit that represents the very top node for your budget, so it's important to select the correct one. For many companies, this organizational unit will be your root organizational unit (e.g., the top-most organizational unit in your organizational structure). The field, Number of Levels, determines how many levels of the organizational structure are referenced during the creation of the budget structure. The number entered in this field corresponds to the depth levels within a structure. In other words, a 1 represents the highest level, and all subsequent numbers represent lower levels. If you want to process the entire structure, just leave this field blank. Blank is also the default and is most typically used.

The last section on the selection screen contains a configurable dropdown called Stock Unit-Only for LTI Budget. This field contains a listing of stock units representing the elements associated to your company’s non-monetary budgets. Again, this field is only required for LTI budgets because the stock unit is a dependency for all LTI budgets.

Note that there is no test run flag for this program. Once executed, the program creates the budget structure (see Figure 4.3).

To view the newly created budget structure, go to Transaction PECM_DISPLAY_BUDGETS or navigate the following path from the Easy Access page: HUMAN RESOURCES • PERSONNEL MANAGEMENT • COMPENSATION MANAGEMENT • ENTERPRISE COMPENSATION MANAGEMENT • BUDGETING • DISPLAY BUDGET.

On the selection screen of the Display Budget report (see Figure 4.4), select the relevant budget type and budget period. From the dropdown, select either the budget unit or organizational unit of the budget structure you want to display. If
the Financing checkbox is checked, the accompanying organizational unit (for each budget unit) is displayed in the output. This is only for informational purposes because all organizational unit–level budget data is maintained and tracked to its associated budget unit.

The output of the program is shown in Figure 4.5. The budget structure is shown as a hierarchy. The following information is shown as a default from left to right in the hierarchy:

- **Budget Unit** — long description of the BU object
- **Object ID** — ID of the BU object
- **Total Budget** — total amount of funds available for allocation (from a roll-up perspective)
- **Total Spent** — total of funds spent (from a roll-up perspective)
- **Total Rest** — total remaining budget (from a roll-up perspective, i.e., Total Budget minus Total Spent Budget)
- **Distributable Budget** — total amount of funds available for allocation (from an individual organizational unit perspective)
> **Spent Budget** — total of funds spent (from an individual organizational unit perspective)

> **Own Rest** — total individual remaining budget (from an individual organizational unit perspective, i.e., Distributable Budget minus Spent Budget)

The transaction is organized in two sections of three. The first section represents the budget view from a roll-up perspective (columns: Total Budget, Total Spent Budget, and Total Rest) whereas the second section represents the budget view from an individual organizational unit perspective (columns: Distributable Budget, Spent Budget, and Own Rest). The two views in total give you a holistic picture of how the organization is fairing once in the planning process. Obviously, after the preparation step, the budget structure is “hollow” (i.e., without any funding). We will return to this transaction later in the process to show the robustness of the information displayed.

### Note

The new compensation functionality (application component PA-EM, ECM) actually uses the same budgeting functionality as the older compensation functionality (application component PA-CM, Compensation Management). This means that the previous transactions, programs, and user exits used to create or fund the budget structure can still be leveraged in the new ECM functionality. However, full regression testing should occur on any pre-existing programming targeted for use in the new functionality.
Transactions still available include:
HRCMP0015 — Change Budget (Administration)
HRCMP0014 — Display Budget (Administration)
HRCMP0011 — Create Budget Structure
HRCMP0012 — Display Budget Structure
HRCMP0013 — Change Budget Structure

There is another way to create and view your initial budget hierarchy. As of version Enterprise 4.7, Web-based Transaction PECM_START_BDG_BSP is available as an alternative for managing budgets. Despite being initiated from the SAP GUI, the transaction launches a web page using Business Server Pages (BSP) technology. This transaction, shown in Figure 4.6, gives you an alternate way of creating the budget within the Budget Maintenance link. (We’ll discuss the other links as we work through those steps.)

**Figure 4.6** Output of Standard Budget Audit Report (with Budget Structure Not Funded Yet)

**Figure 4.7** Create Budget Screen with Budget Type, Budget Period, Organizational Unit, and Depth Available

After selecting the Budget Maintenance link, click on the Create button. In this screen, select your Budget Type and Budget Period from the relevant dropdown selections (see Figure 4.7). In the Org Unit ID field, enter or search for the root
organizational unit that you want to use as your top-node budget. For searching, click the Binoculars icon and select the appropriate organizational unit from the pop-up. Depth operates the same way as the functionality on the GUI version.

**Note**

Before using the budgeting BSP pages, you must work with your Basis team to activate all BSP applications starting with prefix hrecm_bd_*. To do this, go to Transaction SICF (HTTP Service Hierarchy Maintenance). On the selection screen of the transaction, select Hierarchy Type “SERVICE.” Activate the following BSP applications under path DEFAULT_HOST • SAP • BC • BSP • SAP: hrecm_bd_start (Overview), hrecm_bd_srv02 (Budget Structure services), hrecm_bd_srv (Budgeting Services), hrecm_bd_ra_vl (Reassign Budget Value), hrecm_bd_maint (Budget Maintenance), and hrecm_bd_chkrl (Check and Release Budget).

Once you have selected (at least) Budg. Type, Budget Period, and Org Unit ID, click the Save button. This creates your budget hierarchy. Click Save again to save the budget. Figure 4.8 shows a newly created budget using this functionality. Like Transaction PECM_GENERATE_BUDGET, a new budget hierarchy is created with no funded budget units.

**Figure 4.8** Newly Created Budget Structure Using Web-based Transaction PECM_START_BDG_BSP
You should note that all budgets are first created in status 1 (Planned). After creating these budgets during this preparation process, you may determine that a structure was either created in error or will no longer be used. In these cases, you can delete the budget hierarchy and all associated relationships via a standard program. To delete a budget in planned status, go to Transaction RE_RHRHDLOO0 or navigate the following path from the Easy Access page: Human Resources • Organizational Management • Tools • Database • Delete DB records.

Warning
If you have been granted access to use this transaction in your production environment, be extremely careful using it.

You should always ensure the program is run in test mode first (the default has the Test flag checked) to verify the deletions from the database. In the selection screen (see Figure 4.9), specify the Plan Version as 01, Object Type as BU, Object ID (the
top-node budget unit of the structure that you want to delete), and evaluation path BU-BU (PMG: Budget hierarchy — budget). You should leave the infotype and subtype fields blank, which tells the program to delete all relevant relationships for all objects selected in the evaluation path.

After running the program, a table of objects and relationships are listed with Plan Version, Object Type, Object ID, Infotype, Subtype, Planning Status, Start Date, End Date, and Object Abbreviation. Figure 4.10 shows this output. When performed in test mode, a message indicating Test Run Without DB Change confirms that no updates were made to the database. When the actual run is performed, no message appears.

Warning
Use extreme caution when using this program.
All program runs should first be performed in test mode before running for updates. It is also important to know what objects are being deleted, because inadvertently deleting other OM objects or relationships could be devastating and could require a system restore from a backup.

To review, step 1 of the process creates the “shell” of the budget hierarchy. After preparation, the budget structure is created but is still not funded. The funding of the budget occurs within the next step of the life cycle — initialization. So let’s discuss the initialization step now.

### 4.2.2 Initialization

Budget initialization involves the funding, checking, and releasing of the budget structure. After the preparation step, the budget hierarchy is created but not funded. In this step, you fund and release the budget after performing a consistency check. A consistency check is used to ensure that all funds roll up properly and all data (objects, relationships between those objects, and infotypes) maintain integrity. It functions much like other consistency checks within the SAP system by indicating success messages (in green), warning messages (in yellow) and error messages (in red).

The actual budget structure can be funded either manually or automatically. How you fund your budget is one of the most important decisions you will make, if you're incorporating the standard budgeting functionality into your implementation. Regardless of the level of automation chosen, the funding of the budget structure populates Infotype 1520 (Original Budget) for each BU. Infotype 1520 holds both the individual and roll-up values — whether they are a value (e.g., dollars) or units (e.g., stock options). The values within Infotype 1520 cannot be maintained through a standard transaction.

If you decide to fund the budget manually, a few transactions can be used. Web-based Transaction PECM_START_BDG_BSP can be launched and used to initially fund the budget manually. After searching for and selecting your budget structure using one of the given selection options (e.g., budget unit name, organizational unit ID, etc.), the “total budget” amounts for each budget unit can be input. This way, you can manually establish your budget using either a “top-down” or “bottom-up” approach. In Figure 4.11, Budget Unit 50002183 (Sales, EMEA) is manually updated with US $35,000.00. This is the total amount that is allocated to
employees within that budget structure. This amount then rolls up to Budget Unit 50002176 (Global Sales), which holds a total budget amount of US $840,000.00 — of which only US $160,000.00 has been distributed to its subordinate budget units: 50002182 (Sales, Americas), 50002183 (Sales, EMEA), and 50002184 (Sales, Asia Pacific / Australia). The Distributable column tells you how many funds are available to distribute to lower (child) organizations. The delta between Total Budget and Distributable is the amount allocated to employees within that budget unit itself.

If you have a large organizational structure with complex budget calculations, this could be a difficult (if not impossible) feat to pull off. Most customers who manually fund their budget structure first calculate the budget numbers outside of the tool (using Excel or another familiar application) and then simply enter values in a top-down or bottom-up approach.

During a manual update, you can also apply mass percentage changes to one budget unit or a budget structure. Using this functionality, you can apply a percentage (either
negative or positive) for one organizational unit (with the possibility to update superior budgets) or apply a “mass percentage change” that updates the entire node you are on and all of the subordinates (that budget unit and all budget units below).

Another important option that is available while applying a percentage change is whether or not you want to update the superior budget values. By selecting the Update Superior Budget Values checkbox, the percentage change (whether applied individually or en masse) will roll up to the highest level of the budget structure. If left unchecked, the higher level budgets will remain unaffected. Figure 4.12 shows the options available for Percentage Change.

![Figure 4.12](Image)

Figure 4.12 Applying Percentage Changes within Planned Budget Structure

Figure 4.13 shows 3% applied to Budget Unit 50002185 (Human Resources, United States) with both the Mass Percentage Change checkbox and the Update Superior Budget Values checkbox selected. This means a 3% budget increase is applied to the Total Budget values for the selected budget unit and all budget units below.
The increases also roll up to the highest level budget — Budget Unit 50002175 (ABC Global Corporation).

Another available option is the Roll-up Value functionality. Using this functionality allows you to perform bottom-up budgeting. If you want to load budget values for individual budget units without considering superior budgets (bottom-up budgeting), it is possible to subsequently roll up budget values with this option. The Roll-up option automatically performs a roll-up of budget values such that both the roll-up and individual budget amounts are corrected. Let's say that budget unit C rolled up to budget unit B, and budget unit B rolled up to budget unit A. In the tool, we then gave all budget units US $1,000 for the total budget. If the Roll-up option was selected, then budget unit C would have US $1,000 as roll-up and individual amounts, budget unit B would have US $2,000 roll-up and US $1,000 individual amounts, and budget unit A would have US $3,000 roll-up and US $1,000 individual amounts.

As you can see, there are several options for assisting in a manual creation of the budget. The Mass Percentage and Roll-up Value functionality provide robust capabilities for speeding up an otherwise lengthy process. Despite these shortcuts, manual budget creation may still not be a viable alternative for your organization. If this is the case, you need to fund the budget automatically.
For most customers, automatic funding is the most popular method of budget allocation because it is more efficient and reduces the amount of errors caused by manual intervention. There are several ways to automate the funding of the budget structure. You can fund a budget unit hierarchy by using one of the methods listed in Table 4.1, which lists each option with a description and the technology used to implement it.

<table>
<thead>
<tr>
<th>Funding Option</th>
<th>Description</th>
<th>Technology Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding via values from the Personnel Cost Planning (PCP) component</td>
<td>Budget funded by importing a Personnel Cost Plan. Assumes budget values have already been created within the PCP component.</td>
<td>Standard Transaction PECM_INIT_BUDGET or through the Import PCP data button in the Web-based Transaction PECM_START_BDG_BSP.</td>
</tr>
<tr>
<td>Funding via SAP Business Add-In (BAdI) HRECM00_BDG0001</td>
<td>A BAdI (HRECM00_BDG0001) is provided from SAP that allows you to update the funding of the budget units.</td>
<td>Web-based Transaction PECM_START_BDG_BSP via the Custom import button calls the active implementation of BAdI HRECM00_BDG0001.</td>
</tr>
<tr>
<td>Funding via a custom program</td>
<td>A custom program can be written to fund a budget hierarchy.</td>
<td>Custom program (either purchased or built).</td>
</tr>
</tbody>
</table>

Table 4.1 Automated Funding Options for Budgets

With the first option, budgets can be created from personnel cost plans within the PCP component. The PCP component is used to calculate staff costs using cost items (e.g., salary wages, fringe benefits, and incentives) to create personnel cost plans. In Figure 4.14, an example of this type of cost plan has been created for the 2010 Merit Budget for the ABC Global Corporation.

By using PCP functionality, bottom-up budgeting can be performed. All budgets can be funded based on an employee-level calculation and can even incorporate guidelines based on current or previous performance management ratings. Within the PCP component, you would need to perform the necessary configuration to support the calculations, including cost items, cost plans, and planning scenarios. The calculations could incorporate a fixed percentage (e.g., 3% for all eligible employees) or guideline percentages based off the employee’s own appraisal rat-
ings. Using the latter approach would necessitate knowing that all (or at least most) of the appraisals for the eligible population are calibrated and completed.

Figure 4.14  Example of a Personnel Cost Plan Established for the 2010 Merit Budget

Note

For more information on configuration steps for PCP, please refer to the SAP Help site at http://help.sap.com/saphelp_erp60_sp/helpdata/en/e9/53c73c13b0ce5be1000000a114084/frameset.htm.

Specific help on the configuration of PCP for ECM budgeting can be found at: http://help.sap.com/saphelp_erp60_sp/helpdata/en/ef/56094043618f5ce1000000a155106/frameset.htm.

After a successful personnel cost plan run, the cost plan is ready for import into the compensation budget. The budget must always be in planned status during this import. Once released, the import utility can no longer be used. Figure 4.15 shows Transaction PECM_INIT_BUDGET and the pop-up dialog used to select the personnel cost plan. On the selection screen, the budget data must be selected under the Budget Attributes and Budget Unit sections. Budget Determination should be HCP1 (PCP). Clicking on the Parameters button displays a pop-up dialog. Here, specify 01 (Current Plan) as the plan version and the appropriate personnel cost plan created within PCP. If only some of the cost items should be included in (or excluded from) the budget, you can do this by using the cost item filter.
In addition to using Transaction PECM_INIT_BUDGET, PCP data can be imported using Web-based Transaction PECM_START_BDG_BSP. Within the Budget Maintenance section of the application, the Import PCP Data button can be used to import PCP plan data. Figure 4.16 shows the Web version. Fields Budget Determination, Personnel Cost Plan, and Cost Item(s) are available for use. Cost Item is optional, but if desired, more than one cost item can be specified to filter the import. Clicking on the Enter More Cost Items button allows you to enter additional cost items.

Both transactions serve the exact same purpose and achieve the same end state — the difference is more a matter of service delivery. If you are using the web inter-
face for other budget matters (e.g., budget creation, budget reassignment, etc.), you may decide to use Web-based Transaction PECM_START_BDG_BSP. Otherwise, SAP GUI Transaction PECM_INIT_BUDGET is probably more practical.

There are two drawbacks to using the PCP approach for budget initiation. The first is that another PCP component must be configured (and tested) to leverage the functionality. Most SAP customers do not use PCP functionality within SAP ERP HCM, and those who do not would most likely also not implement the functionality to solely support the compensation budgeting process in ECM. The second drawback is that once the budget is released (and spent), it cannot be refreshed using this functionality. This is less of an issue if you plan on using a freeze date or period, but it makes the planning process unmanageable if you are trying to keep the budget allocation current based on employee movement.

Now let’s take a look at a second approach for automating budget funds — using BAdI HRECM00_BDG0001 (Compensation Budgeting: User exit). This BAdI has one method — called DETERMINE_BUDGET_VALUES — which allows updates to the budget values stored within Infotype 1520. Figure 4.17 shows the method and interface of the BAdI.
Within the Budget Maintenance section of the Web-based Transaction PECM_ START_BDG_BSP, a Custom import button is available. Clicking on this button allows a budget (in planned status) to be recalculated based on the logic implemented within the active implementation of BAdI HRECM00_BDG0001. In addition, a custom program could call this BAdI implementation to apply specific logic to the budget funding.

The third approach is to use a custom program to fund budgets. As described earlier, this program may utilize BAdI HRECM00_BDG0001. However, logic can be written to update the budget structure based on your specific requirements — regardless of budget status (planned or released). That last point is extremely important because the standard functionality (via Web-based Transaction PECM_ START_BDG_BSP) cannot automate mass refreshes.

Budget reassignment functionality is discussed in the next section, but another big win for using this approach is that you can use the same custom program to refresh the budgets (after budget release) as you do when initializing. Figure 4.18 shows an example of a Budget Allocation Program. In the selection screen, you are
allowed to select a Budget Type, Compensation Review Item, Budget Period, Budget Unit, and Key Date to allocate the budget. In this design, the budget hierarchy with top Budget Unit (50000723) will be refreshed on Key Date 01/31/2007 based on the Budget Type, Compensation Review Item, and Budget Period.

Figure 4.18 Custom Budget Allocation Program

The program can apply a fixed percentage (e.g., 3%) or can incorporate more complex logic. For example, in Figure 4.19, a custom table is shown that allows the storage of a percentage based on Personnel Area. In this scenario, employees in PA DE01 are budgeted at 10% while employees in PA US01 are budgeted at 5%. This is a simple scenario but more sophisticated logic can be implemented based on requirements and design considerations.

Figure 4.19 Custom Table to Support Custom Budget Allocation Program

You have now seen the differences between manually or automatically updating the budget hierarchy structure for its initialization. After initially funding the bud-
get hierarchy, it’s important that the budgets are checked for consistency before being released. Budgets must be programmatically changed from status 1 (Planned) to status 2 (Released) to be planned against in a productive environment. Figure 4.20 shows the Check and Release Budget section within Web-based Transaction PECM_START_BDG_BSP. While still in planned status, consistency can be checked by selecting the Check Values button. The message Budget Values are Consistent is displayed in the upper left corner of the screen when the budget has no issues. The budget check does a check to ensure budgets roll up consistency (i.e., superior budgets fund lower level budget units) and to review budget unit to organizational unit relationships to validate proper linkages.

![Check and Release Budget](image)

**Figure 4.20** Check Budget for Consistency Using Web-based Transaction PECM_START_BDG_BSP

This same functionality is available from the SAP system via Transaction PECM_CHK_BUDGET (Check and Release Budget). Figure 4.21 shows Transaction PECM_CHK_BUDGET. On the selection screen, a Budget Type, Budget Period, and Budget Unit ID are specified. A Check Values radio button under the Processing Options section of the screen indicates that the consistency check should be performed.
After running Transaction PECM_CHK_BUDGET for consistency, an output screen is rendered with any issues listed. If the budget values are consistent, the message Budget Values are Consistent is prefixed with the Budget Unit ID (see Figure 4.22).

After a successful consistency check, the budget must be released. Like most of the budget functionality within ECM, the budget can be released in two ways — online or in the SAP GUI. If performed online, web-based Transaction PECM_START_BDG_BSP can be accessed for releasing the budget. Within the Check and Release Budget section, the Release Budget button is available (see Figure 4.23). To release the budget, you need to select the root object (top-level) budget. In other words, the budget hierarchy can only be released at its highest level.
After release, you will see the message Budget is Successfully Released; Save Your Changes. Be aware that the budget units will not be saved in released status until you actually select the Save button on the upper left section of the screen. Figure 4.24 shows a budget structure in released status. (Notice the Budget Status field on the top of the screen has been changed to Released).

The other option for budget release is via the standard SAP GUI Transaction PECM_CHK_BUDGET. On the selection screen, a Budget Type, Budget Period, and Budget Unit ID are specified (it is the same program as the consistency check). A Release Budget radio button under the Processing Options section of the screen indicates that the budget should be released. In Figure 4.25 you can see the output after budget release Message Text Budget 50002175 Status is Successfully Set to Released.
Once a budget is released, you can only go back to the planning status if none of the budget has been spent. There are two ways to do this:

- The Reset to Planning Button on the Budget Details section of Check and Released from Web-based Transaction PECM_START_BDG_BSP
- Transaction PECM_CHK_BUDGET can be used to select Reset to Planning (see output in Figure 4.26)
Once the budgets have been checked and released, you can begin compensation planning. This is usually the final step before giving access to the portal to your planning managers and HR professionals/specialists.

So, let's look at how to maintain the budget structure once you're in a production environment. The next step in the process — *maintenance* — enables the HR or Compensation department to update budget data even after release.

### 4.2.3 Maintenance

As of Enterprise 4.7, budgets can be maintained even after the budget has been released via the web-based Transaction PECM_START_BDG_BSP. The budget reallocation functionality is found in the Budget Reassignment section of the start page. Budgets can be manually reallocated using this functionality regardless of planned and released status.

The Budget Reassignment section within web-based Transaction PECM_START_BDG_BSP houses this functionality, which is composed of four steps:

- Choose Sending Org. Unit
- Choose Receiving Org. Unit
- Enter Values
- Review Results

In Figure 4.27, Organizational Unit 50000073 (Facilities) has been selected as the sending (losing) organizational unit. It is from this organizational unit (i.e., Budget Unit) that budget values are transferred.
Step 1 of Manually Reassigning Budget Values: Selecting Sending Org. Unit

In step 2, the receiving organizational unit is selected. Figure 4.28 shows Organizational Unit 50000074 (HR Business Partner) selected as the receiving organizational unit. It is from within this Organizational Unit (i.e., Budget Unit) that budget values are transferred.

Figure 4.27  Step 1 of Manually Reassigning Budget Values: Selecting Sending Org. Unit

Figure 4.28  Step 2 of Manually Reassigning Budget Values: Selecting the Receiving Org. Unit
In step 3, the budget and spend values are specified (see Figure 4.29). The new values for Total Budget and Spent Budget are identified. After input, select the Reassign button. When you see the message Budget Has Been Successfully Transferred; Review and Save, this indicates that you can proceed in the process.

During the last step of the process, a review is done before any funds are transferred. For both the sending and receiving organizational units, the following information is displayed for final review (see Figure 4.30):

- Sending Org. Unit — Original Total Budget
- Sending Org. Unit — New Total Budget
- Sending Org. Unit — Original Spent Budget
- Sending Org. Unit — New Spent Budget
- Receiving Org. Unit — Original Total Budget
- Receiving Org. Unit — New Total Budget
- Receiving Org. Unit — Original Spent Budget
- Receiving Org. Unit — New Spent Budget

In addition, the new budget hierarchy is displayed with the new values within the structure. You can traverse through the structure to see how the proposed transfer affects the existing hierarchy, and to save the transfer of budget funds, you need to select the Save button.
Although this manual process allows you to reallocate budget funds from one budget unit (or organizational unit) to another, it is not always sufficient due to the volume of employee changes that occur during planning time. For instance, employee movements (such as promotion and transfers) and employee terminations may account for hundreds (even thousands) of transactions.

You can, however, achieve a more automated means of keeping current with changing budget data using a custom program similar to the one described during our initialization discussion. In fact, one program can be created to both initialize and continuously refresh the budget units. This is the most popular means of refreshing the budget automatically.

Note

In versions of SAP before Enterprise 4.7, budgets could not be updated once in released status. The concept of manual or dynamic budget reassignment is regarded as one of the most critical pieces of the solution.

After the planning period ends, it is time for budget closure. Budget closure is the last step in the process.

4.2.4 Closure

Budget closure is the informal process that involves the final reconciliation between budgeted and spent funds from a roll-up perspective. Although there is no status
for archiving the budget, the status is kept as “Released.” Reports, such as PECM_DISPLAY_BUDGETS, can be run and given to management teams to validate adherence to the budget.

The four steps covered — Preparation, Initialization, Maintenance, and Closure — provide the storyboard for the budgeting process with ECM. Understanding the available options within each of these steps is important to your own implementation and maintenance.

### 4.3 Locking

Unfortunately, budget locking problems are quite common and can cause a lot of user frustration. Budget locking was actually built to maintain data integrity. When a user accesses the planning sheet on the SAP portal, the budget units associated with the employees being planned on become locked. A budget lock is intentionally placed on all BUs that are being processed to ensure that no other manager (or HR Professional) can decrease budget funds from those same budget units. This is a very good thing because it retains the integrity of the budget data being planned against.

However, when a manager does not exit out of the iView properly, the lock on a budget may not release. When that same manager tries to plan again (or if a higher-level manager attempts to plan) for employees in the affected budget units, a hard error message appears. Figure 4.31, for example, shows the error message Budget 50000773 is locked for user JMARTIN and Budget 50000774 is locked for user JMARTIN. The error message is repeated for all affected employees on the screen, which means that a line item appears on the portal worksheet for each case.

To manually release locks, you use Transaction SM12 (Select Lock Entries). Figure 4.32 shows the selection screen. You can easily determine budget unit locks for a particular user by providing the SAP username (e.g., JMARTIN) of the user and clicking on the List button.
Figure 4.31  Budget Locking Error on Portal Compensation Worksheet

Figure 4.32  Selection Screen for Transaction SM12

Figure 4.33 shows the output of Transaction SM12. The lock entry list provides important information on the lock such as user name, time, mode, table, and lock argument. The lock argument specifies the exact budget unit being locked along with other technical information.
Let's now discuss the infotypes integral to the budgeting process.

**4.4 Infotypes**

There are several infotypes that facilitate the budgeting functionality in SAP, so let's look at each in detail.

**4.4.1 Infotype 1000 (Object)**

Infotype 1000 (Object) holds the budget unit’s short and long texts. The short and long texts are taken directly from the short and long texts of the organizational unit upon initial budget structure creation. You can change these manually via web-based Transaction PECM_START_BDG_BSP if you want.

**4.4.2 Infotype 1001 (Relationships)**

Infotype 1001 contains all of the relationships. In Table 4.2, the objects and relationships used within the budgeting process are listed.
Relationship 003 is used to connect the budget structure with the organizational unit structure from an organizational structure hierarchy perspective, and relationship 300 is used to link a budget unit to an organizational unit from a financial (budget) perspective.

### 4.4.3 Infotype 1500 (BS Element Management)

Infotype 1500 provides important data on the budget unit such as budget type, status (planned versus released), whether the budget is allocable, and the financial year.

### 4.4.4 Infotype 1520 (Original Budget)

Infotype 1520 is where both the total roll-up and individual budget amount is stored.

Now let's discuss the configuration of the budgeting functionality. This configuration is required if you are budgeting within ECM.
4.5 Configuration

The configuration tasks supporting the budgeting functionality within ECM are relatively straightforward. All budgeting configurations are performed within the Implementation Guide (IMG) under the path: PERSONNEL MANAGEMENT • ENTERPRISE COMPENSATION MANAGEMENT • BUDGETING. The following components compose the configuration:

- Define Reference Currency for Budgeting
- Define Budget Types
- Define Budget Periods
- Set Budget Control Parameters

A link to display all implementations of BAdI HRECM00_BDG0001 is available under the path: PERSONNEL MANAGEMENT • ENTERPRISE COMPENSATION MANAGEMENT • BUDGETING • BUSINESS ADD-IN: INITIALIZE BUDGET VALUES.

In Figure 4.34, you can see the IMG activities to set up budgeting.

![Figure 4.34 Budgeting Node within the IMG](image)

The first configuration item is to Define the Reference Currency for Budgeting.
4.5.1 Defining Reference Currency

A reference currency is a key step within the process because all budgets must have one. And because all budgets must roll up to one and only one currency, a default (or reference) currency must be defined within the configuration. All other currencies are converted into the reference currency using the standard SAP currency conversion table (TCURR), which holds all of the exchange rates. Standard ECM uses exchange rate type M, which is defined within the system as the “standard translation at average rate.”

The reference currency is configured within the IMG via the path: PERSONNEL MANAGEMENT • ENTERPRISE COMPENSATION MANAGEMENT • BUDGETING • DEFINE REFERENCE CURRENCY FOR BUDGETING. You can also access the reference currency directly from Transaction SM30 from Table view V_T7PM2_B.

In Figure 4.35 you can see that for Budget Type Group 02 (Compensation Management), USD (United States Dollar) has been defined as the reference currency.

![Figure 4.35 Reference Budget Currency within the IMG](image)

Next, let's discuss the configuration of budget types.

4.5.2 Defining Budget Types

Budget types are set up to record the various budget “buckets” or “pools” within your organization. Budget types do not need to be created each year unless new compensation plans have been defined. For example, if some year in the future, you implement a new LTI plan, you will need to create a new budget type, assuming you have not been managing an LTI process in ECM previously.
Budget types are configured within the IMG via the path: Personnel Management • Enterprise Compensation Management • Budgeting • Define Budget Types. You can also access budget types directly from Transaction SM30 from Table view V_T7PM3_B. You can see this configuration table in Figure 4.36.

Budget type is a four alphanumeric field and its name has a 20 character limit. Each budget type has two checkboxes. The first checkbox, Mon. Budget, is the indicator for monetary budget. If this checkbox is selected, it indicates to the system that the budget units associated with this budget type are managed in currency units. A budget for merit increases, for example, would be based on currency and the budget type would be selected as monetary. Most stock plans would not have this value selected because they are unit based, not currency based.

The last checkbox is an Allocat. flag. Budgets can only be allocated in the system when this flag is selected because it is equivalent to an active flag. Only when this flag is activated can budgets be distributed and operational. You could use this functionality if, for example, you retire a compensation plan within your system and want to be ensure that no future budgets use that particular budget type.

Now that we understand budget types, let's discuss what budget periods are and how they are used.

### 4.5.3 Define Budget Periods

A budget period defines the time frame in which you administer your budget. The timeline (start and end date) should include the effective date of the compensa-
tion element (i.e., Infotype 0759 record). For example, if the effective date of your merit adjustment is 04/01/2009, then your budget period should contain this date within its range. Examples of budget periods include 04/02/2008 - 04/01/2009, 01/01/2008 - 04/02/2009, and even 04/01/2009 - 04/01/2009 in this scenario.

The key date is the day on which the currency conversion takes place during the budget creation process (if any conversion is needed). If left blank, the system uses the system date as its conversion date when creating the budget unit.

To configure your budget periods within the IMG you follow the path: PERSONNEL MANAGEMENT • ENTERPRISE COMPENSATION MANAGEMENT • BUDGETING • DEFINE BUDGET PERIODS. You can also access budget periods directly from Transaction SM30 from Table view V_T7PM9_B. Figure 4.37 shows this configuration table view.

After configuring budget periods, control parameters can be set within the configuration. This is performed in the next IMG activity, which we will explain next.
4.5.4 Set Budget Control Parameters

By setting certain control parameters within the configuration, you can influence the behavior of some important budgeting functionality. The first control parameter determines if the reassignment of a budget is permitted after (at least) some of it has already been spent (i.e., allocated) on an employee. The second is related to the budget allocation of the planning manager. Based on this flag, the system either funds the manager’s own organizational unit or the organizational unit above the organizational unit where the manager sits.

You can set budget control parameters within the IMG under the path: PERSONNEL MANAGEMENT • ENTERPRISE COMPENSATION MANAGEMENT • BUDGETING • SET BUDGET CONTROL PARAMETERS. You can also access these control parameters directly from Transaction OOECM_BD.

Figure 4.38 shows the two control parameters. If this view looks familiar, it’s because both values are stored in Table T77S0.

![Figure 4.38 Budgeting Control Parameters Configuration within the IMG](image)

This transaction simply isolates these two compensation budget-relevant values. In Table 4.3, each value is described in detail with comments.

This concludes the configuration review of budgeting functionality within ECM. As you can see, several important constructs including budget types, budget peri-
ods, and other specifics — such as reference currency and control parameters — need to be configured to utilize the budget functionality within ECM.

<table>
<thead>
<tr>
<th>Group</th>
<th>Semantic Abbreviation</th>
<th>Value Abbreviation (default)</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRECM</td>
<td>BDGRA</td>
<td>X</td>
<td>Reassignment allowed after budget has been spent</td>
<td>$X = you can reassign this budget, even if part of it has already been spent. If blank, the system checks if any part of this budget has already been spent. If so, you cannot reassign this budget.</td>
</tr>
<tr>
<td>PCOMP</td>
<td>MGBUD</td>
<td></td>
<td>Budget for line manager</td>
<td>If $X$, the budget of the next highest organizational unit (for which a budget is available) is used. In other words, the line manager of an organizational unit is paid from a different budget than the other employees in the organizational unit.</td>
</tr>
</tbody>
</table>

Table 4.3 Budget-related OM Objects and Their Relationships to Other Objects

### 4.6 Summary

As you learned in this chapter, compensation budgets constitute a critical piece of the process. Frequently, Key Performance Indicators (KPIs) and metrics are reported out against how well a functional area, division, subsidiary — and eventually — company have done in keeping to budget. Managing the life cycle — from preparation, initialization, maintenance, and closure — will enable a smooth process from start to finish.

In the next chapter, we will discuss the compensation planning and approval process, and one of the key activities within ECM — activation.
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