Human Capital Management (HCM I) Case Study

This case study explains a Human Capital Management process using organizational management and personnel administration.

Product
S/4HANA 1709
Global Bike

GUI 7.50

Level
Beginner

Focus
HCM

Authors
Claudia Kroliczek
Mark Lehmann
Chris Bernhardt
Stefan Weidner

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3.2

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MOTIVATION

This case study represents an introduction to human resource related organizational management and personnel administration in a human resource management system on the basis of the HCM (Human Capital Management) module of an SAP S/4HANA system.

Hence, the case study is addressed to SAP HCM first-time users. As previous knowledge, basic principles of S/4HANA as well as navigation fundamentals in an SAP S/4HANA system are required.

In the scenario's context of the HCM case study, a new department in the GBI company is created. Three positions are defined within the new department, from which two are assigned to employees in the course of the case study.

PREREQUISITES

Before you use this case study, you should be familiar with navigation in the SAP system.

Furthermore, it is mandatory to review the note GUI 7.50 Configuration. Your lecturer got this documentation together with other lecturer notes. If you do like to use the old GUI settings, please use the S/4HANA documents for SAP GUI 7.40.

In order to successfully work through this case study, it is not necessary to have finished the HCM exercises. However, it is recommended.

NOTES

This case study uses the Global Bike (GBI) data set, which has been created exclusively for SAP UA global curricula.

Process Overview

Learning Objective Understand and perform a Human Resource process.	**Time** 140 min

Scenario In the Global Inc. in Dallas, a new security department will be equipped with three positions. You, as an employee in Human Resources are responsible for maintaining the data of the new employees in the system and for hiring a new employee in the course of a recruiting process. Through additional training and assessment, the new employee potentially has the chance to be promoted. This system of double control ensures the transfer of all changes in the organizational management.

Employees involved   Marco Romero (Recruiting Officer)

Sang Cha (Personnel Administration Officer)

You start the process with the creation of three positions for the head of the department, a security manager and a security guard. Afterwards you define the qualification profiles for the individual positions as well as their dependencies. Subsequently, the position of the head of the department is staffed by means of a personnel action. Afterwards you maintain the bank details and the basic pay of the head of the department. The position of the Security Guard, however, is posted within a public medium. An employee is eventually hired with the intention of a quick promotion to Security Manager. In order to qualify a Security Guard for the position of the Security Manager, book for them an advanced training course. Before ultimately promoting the employee, undertake a full assessment. Finally, review the changes in the organizational plan.
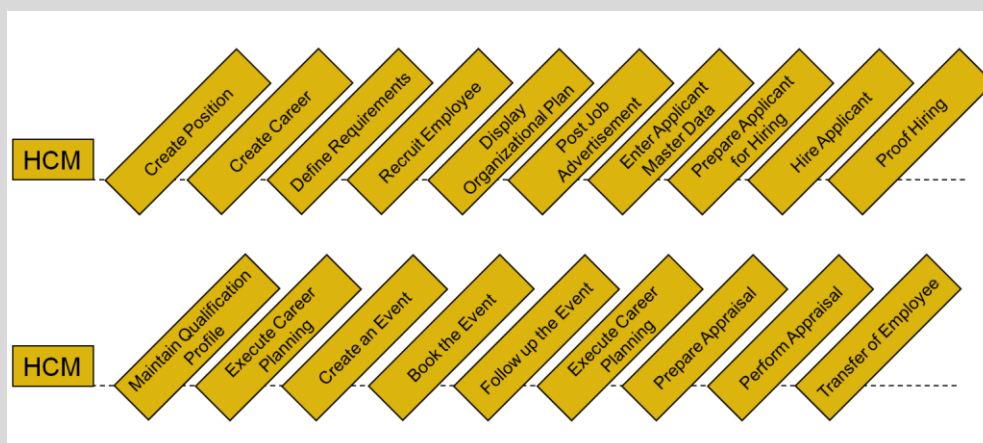
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Step 1: Create Positions

Task Create positions within the organizational structure.	**Time** 10 min

Short Description Use the SAP Easy Access Menu to create three positions for the new security organizational unit.

Name (Position) Marco Romero (Recruiting Officer)

|	
Positions are occupied by employees. If a position is not occupied, it is vacant. Positions are assigned to organizational units. Example: position administrator of accounts payable accounting.	Positions

To create a position, follow the menu path:	Menu path

> **Human Resources ► Organizational Management ► Organizational Plan ► Organization and Staffing ► Change**

Change the previewed periods to be able to create positions which are valid

for the past. Therefore, please click 📅 and enter **1ˢᵗ of the last month** as start date. Also enter **one year** in the future as Preview period.

The positions should be created in the department **### Security,** ### being replaced by your group/computer number. Therefore, please go to the window *Find by* on the left side of the screen**.** There, click on **Organizational unit** and **search term**, enter the search term **### Security** in

the name entry field and press Find . The search result should be displayed in the Hit list window on the left side of the screen.

1ˢᵗ last month
One year

Security
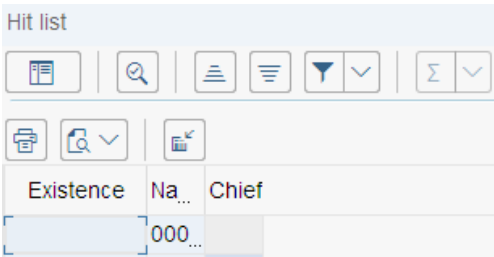
Please choose your organizational unit via double-clicking so that it appears on the right side of the screen. Highlight your organizational unit and click

on 🗋 in the context menu. In the upcoming screen *Choose Relationship*, please choose *Incorporates* 👤 Incorporates .

Choose Relationship ✕

≡

⌄ ■ O   Organizational unit
　■ B 002 O Is line supervisor of   Organizational unit
　⌂ B 003 S Incorporates   Position

Continue　Cancel

A new position was created underneath your **### Security** department. On the bottom of the screen, the details for the new position are displayed. There, please enter the abbreviation **### CSM** for the position and **### Chief Security Manager** as the name. Please activate the check box **Head of own organizational unit.**

Enter **1ˢᵗ of the last month** as Valid from. If this field should be greyed out,

please click on [icon] *Display key date*. The functionality should be available then.

✓ Basic data　Account assignment　Address　Cost distribution　Work schedule　Job Index　IT1653　Tasks

Position: 000 CSM　　000 Chief Security Manager
Job: Not assigned
✓ Head of own organizational unit

Valid from: 01.02.2018
To: 31.12.9999

Press Enter and Refresh Data to update the entered information, click on

Yes to save your data. The organizational structure should now look as follows.

Staff assignments (structure)	Code	ID
☐ ⌄ ■ 000 Security	000 Security	O 50000025
☑ ⌂ 000 Chief Security Manager	000 CSM	S 50002175

If you do not see the columns *Code* and *ID*, you can insert them by pressing

[icon] and choosing the respective columns. Continue with Continue .

According to the previous procedure, please create two further positions for a Security Guard and a Security Manager in the Security department. For both positions, choose the same date as in the previous step for Valid from. As abbreviation, please choose **### SG** and as name **### Security Guard**. Click Save and Refresh Data .

1st of the last month
SG
Security Guard

For the third position, please choose **### SM** as abbreviation and as name **### Security Manager.** Click Save and Refresh Data to update the information. Your structure should now look like the following picture.

SM
Security Manager

Click on the exit icon to return to the SAP Easy Access screen.

Step 2: Create Career

<table>
<tr><td>Task Create a career for an employee.</td><td>Time 10 min</td></tr>
</table>

Short Description Use the SAP Easy Access Menu to create a career for an employee.

Name (Position) Sang Cha (Personnel Administration Officer)

To create a career, follow the menu path.

Human Resources ► Personnel Management ► Personnel Development ► Settings ► Current Settings ► Edit Careers

In the screen *Career Maintenance*, please choose the Plan Version **01** (Current Plan) and the **current date** as the Key Date. Choose Execute. Press Create to create a new career. As the name, please enter **### Security Guard** and press Create.

01
Current Date

Security Guard

Back in the *Career Maintenance* Screen, please select the career you just created and choose **Career ► Change**. The graphical editor for maintaining careers will be opened and enables you to create the career in form of a network.

The first station of the career is supposed to be a position. To create the position, please click on the *position* field in the **Node Area** on the bottom right side of the screen and afterwards please click in the **Display Area** on

the left side of the screen. If the structure search opens in the *Choose Position* screen, click on ••• and choose S: Search Term .

Otherwise you already are in the *Restrict Value Range* screen. Enter the search term **###***.

###*

Restrict Value Range	✕

S: Search Term   T: Structure Search   C: Abbreviation and Name   R: Sear... ❯ •••

Search Term: 000*

Continue   Cancel

Select your position **### Chief Security Manager** by clicking on it and confirm your selection with Enter.

Position 3 Entries   ✕

Plan version 01
Object type S

| ObjectID	Object abbr.	Object name	OrgUnit abbr	Start	End Date
50002175	000 CSM	000 Chief Security Manager	000 Security	01.02.2018	31.12.9999
50002176	000 SG	000 Security Guard	000 Security	01.02.2018	31.12.9999
50002177	000 SM	000 Security Manager	000 Security	01.02.2018	31.12.9999

✓ ▼ ★ 🔍 ⊗

Back in the *Display Area*, you should be able to see a yellow box with the position.

**LB 50002178 000
Security Guard**

**S 50002175 000 Chief
Security Manager**

In the **Node Area**, please click on the position sign again to create another position below the position already created. This time select the position **### Security Manager** from the path mentioned above.

LB 50002178 000
Security Guard

S 50002175 000 Chief
Security Manager

S 50002177 000
Security Manager
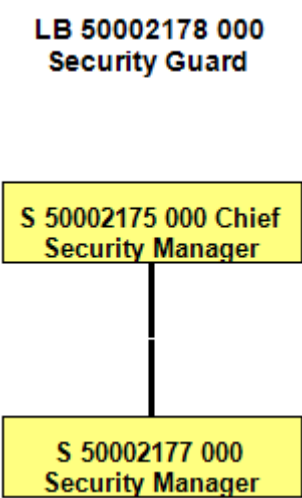
Double-click on the position you just inserted and enter duration of **5 years**.

☰	Maintain Duration	✕

Career Item

000 Security Manager

Duration

| 5 | Years: | | Months: | | Days |

✓   Profile   ▤   ⊗

Finally, insert another position and choose **### Security Guard** from the Structure Search. Enter duration of **3 years**. The network of the career should look as follows:

LB 50002178 000
Security Guard

S 50002175 000 Chief
Security Manager

S 50002177 000
Security Manager

S 50002176 000
Security Guard

Click on Save , close the graphical editor and click on the exit icon < to return to the SAP Easy Access screen.

Step 3: Define Requirements

Task Define requirements for positions.	**Time** 5 min
Short Description Use the SAP Easy Access Menu to define necessary qualifications/requirements for positions.	
Name (Position) Marco Romero (Recruiting Officer)	
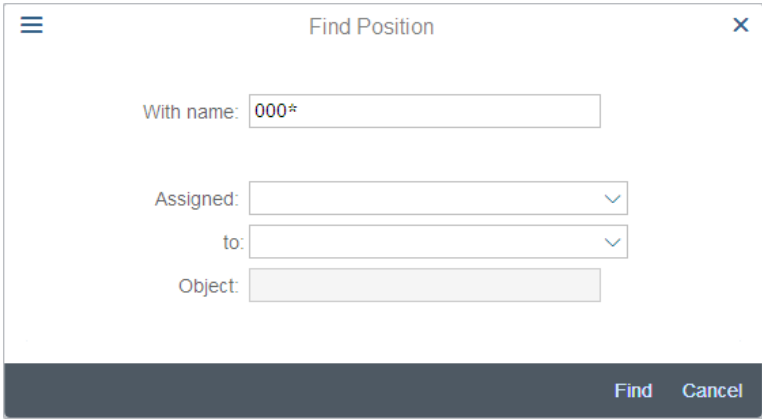
In order to define the requirements for a position, follow the menu path:

Human Resources ► Personnel Management ► Personnel Development ► Profile ► Change

In the screen *Find by*, expand Position ⚇ Position and click on **Search Term**. In the now appearing search screen, please enter ###* into the field With name in order to find your positions.

###*

Afterwards, click on Find.

In the lower part of the screen, the results are displayed within the *Hit List*. Please choose your position (**### Security Manager**) via double click.

A list of requirements is displayed in the right part of the screen. Click on

 in order to define further requirements for the position.

Change to the tab *Abbreviation and Name*. Do not change the Object Abbreviation (*), so that all possible qualifications will be displayed and make sure the Language Key is set to **EN**. Press Enter to confirm your search.

Please choose **First Aid Certification** and **GIAC Security Leadership Certification** by selecting the individual qualifications. Press [✓] to confirm your selection.

	Abbreviation	Name	L	PV	Ob	ObjectID
☐	ACCOUNTING	ACCOUNTING	EN	01	Q	50000025
☐	ASSOCIATE DE	ASSOCIATE DEGREE	EN	01	Q	50000008
☐	BACHELOR'S D	BACHELOR'S DEGREE	EN	01	Q	50000009
☐	CPA	CPA	EN	01	Q	50000001
☐	CUSTOMER SER	CUSTOMER SERVICE	EN	01	Q	50000026
☑	FIRST AID CE	FIRST AID CERTIFICATION	EN	01	Q	50000244
☐	GED (HIGH SC	GED (HIGH SCHOOL DIPLOMA)	EN	01	Q	50000010
☑	GIAC SECURIT	GIAC SECURITY LEADERSHIP CERTIFICATION	EN	01	Q	50000246
☐	LOTUS SUITE	LOTUS SUITE	EN	01	Q	50000016
☐	MANAGEMENT	MANAGEMENT	EN	01	Q	50000027
☐	MASTERS	MASTERS	EN	01	Q	50000011
☐	MICROSOFT WI	MICROSOFT WINDOWS XP	EN	01	Q	50000021
☐	MICROSOFT WI	MICROSOFT WINDOWS XP PROFESSIONAL	EN	01	Q	50000019

Qualification (1) 28 Entries found

28 Entries found

For both entries, please type in **Yes** in the *Proficiency* column since these qualifications imply certificates which employees may earn. Label both requirements as **Ess** by placing a checkmark within the particular qualifications and choose the **1st of the last month** as the beginning.

Requirements

	Qualification group	...		ObjectID	Name	Proficiency	Ess
☐	Certification		Q	50000244	First Aid Certification	Yes	☑
☐	Certification		Q	50000246	GIAC Security Leadership Certificati…	Yes	☑

Please save your data with [Save].

Click [<] in order to return to the SAP Easy Access Menu.

Step 4: Hire Employee

Task Hire an employee for the new position.	**Time** 15 min

Short Description Use the SAP Easy Access Menu in order to hire an employee for the new security department.

Name (Position) Marco Romero (Recruiting Officer)

To hire the employee, follow the menu path:

Human Resources ► Personnel Management ► Administration ► HR Master Data ► Personnel Actions

Please enter the **1ˢᵗ of the last month** as the start date. Make sure that the field Personnel Number is empty, and press enter. Following, select the action **Hiring (TE mini master)** and enter **GBI Dallas** as the personnel area, **Active [1]** as employee group and **Salaried Employees [U4]** as employee subgroup via F4 Help. Then, highlight the action and click on Execute Execute .

Personnel Actions			
Action Type	Personnel...	EE group	EE subgr...
○ Leaving			
○ Reentry into company			
○ Time recording (mini master)			
○ Time rec.(supplement)			
● Hiring (TE mini master)	DL00	1	U4
○ Org.management (mini master)			

In the *Create Actions* screen, find the position **### Chief Security Manager** with the F4 help. Then, press Enter to continue.

Organizational assignment		
Position:		
Personnel area:	DL00	GBI Dallas
Employee group:	1	Active
Employee subgroup:	U4	Salaried employees

Please save Save your data. You will automatically be taken to the next InfoType. Write down the Personnel Number of your employee, stated at the top of the screen in the field Personnel No.

In the *Create Personal Data* screen, enter a **name** and a **date of birth** for your manager. For Social Security Number (*SSN*), choose **618253###**. Make sure the gender is chosen in the checkbox. Then, press enter to confirm your entries. The screen with all data should look like displayed in the following screen.

Margin notes:
Menu path

1st last month

DL00
1
U4

Chief Security Manager

Personnel number:
_____

Name
Date of Birth
SSN

Then, save [Save] your data. You will automatically be taken to the next InfoType.

In the *Create Organizational Assignment* screen, define **EX00** as subarea.

EX00

Save [Save] the data and choose **YES** to confirm the selection of your position's vacancy.

Save [Save] the InfoType *Travel Privileges* without any changes.

In the next window, choose **(1) Permanent residence** as the subtype for the InfoType Addresses and continue with ✓ .

☰	Subtypes for infotype "Addresses" (1) 18 Entries found	✕
	Restrictions	

STyp	Name
1	Permanent residence
2	Temporary residence
3	Home address
4	Emergency address
5	Mailing address
6	Nursing address
7	

In the *Create Addresses* screen, enter optional data for Street. In the City field, enter **Dallas**, select **TX** as State and postal code **75201**. Save your data with Save .

In the Tax Area screen, please choose **TX** as tax area and press Enter.

☰	Tax Area (1) 3 Entries found				✕
	Restrictions				

Tax Area	Description	PostalCode	PostalCode	Start Date	End Date
FED	Federal	00000-0001	99999-9999	01.01.1980	31.12.9999
TX	State of Texas	73301-0000	88589-9999	01.01.1980	31.12.9999
TX01	Texarkana, Texas	73301-0000	88589-9999	01.01.1980	31.12.9999

3 Entries found

Save Save your data to proceed with the next InfoType. The following two InfoTypes can be saved without any changes. Choose once again Texas in the screen *tax area*. Afterwards save the three tax-views again and accept any data overrides with a click on ✓ .

Save the screen *Create Bank Details* without any changes. Enter your system username as required in the last InfoType and save once again.

Click on the exit icon ‹ to return to the SAP Easy Access screen.

☐

Step 5: Display Organizational Plan

Task Display the changes you have made to the organizational plan.	**Time** 5 min

Short Description Use the SAP Easy Access Menu to display the modified organizational plan of the Administration department.

Name (Position) Sang Cha (Personnel Administration Officer)

To display the changes in the organizational plan, follow the menu path.

Human Resources ▶ Organizational Management ▶ Organizational Plan ▶ Organization and Staffing ▶ Display

Please check if your employee is allocated to the **### Chief Security Manager's** position. If you do not see your organizational unit in the structural view, please search for your organizational unit **### Security** in the *Find by* window and open it in the structural view on approval. Now you should see that your employees are allocated to the right positions.

Chief Security Manager

Security

Staff assignments (structure)	Code	ID	Chief
∨ ▣ 000 Security	000 Security	O 50000025	Mr Marcus Miller
∨ 🙎 000 Chief Security Ma	000 CSM	S 50002175	
🙎 Mr Marcus Miller	Miller	P 00000069	
🙎 000 Security Guard	000 SG	S 50002176	
🙎 000 Security Manager	000 SM	S 50002177	

Click on the exit icon [<] to return to the SAP Easy Access screen.

☐

Step 6: Post Job Advertisement

Task Post a job advertisement.	**Time** 10 min
Short Description Use the SAP Easy Access Menu to post a job advertisement.	
Name (Position) Marco Romero (Recruiting Officer)	

To post a job advertisement, follow the menu path:

Human Resources ► Personnel Management ► Recruitment ► Advertising ► Advertisement ► Maintain

In the upcoming screen *Postings*, please click Execute in order to view all existing advertisements. In the screen *Maintain Advertisements,* choose

Advert **(F7)** to create a new advertisement. Assign a new Advertisement Number by clicking on

F7

Next free advertisement number . As Recruitment Instrument the company has chosen the **Dallas Observer** and the advertisement has been published on **1st of the last month**. The advertisement end is planned for the **1st of the following month** and the publication costs amount **10,000 USD**. Enter **Advertisement - ### Security Guard** as the Text name, replacing ### by your group/computer number.

Dallas Observer
1st last month
1st following month

10.000 USD
Advertisement - ###
Security Manager

SAP — Create Posting — Exit

More ∨

Advertisement: 00000001   Next free advertisement number

Publication

Instrument: 00000101
Publication date: 01.02.2018
Advertisement end: 01.04.2018
Publication costs: 10000 USD
Text name: Advertisement - 000 Security Guard

Maintain text

Afterwards, please choose Maintain text to insert the text for the advertisement. Enter a text of your choice and save the text by clicking on

Text for the advertisement

Save . With ◁ , go back to the screen *Create Posting*. Choose

Add to add the vacant position to your advertisement.

Therefore, choose 🔍 and enter ###* in the field Find. Highlight your position and press ✓ in order to adopt the entry.

	Vacancy	Short Text of Position	Start Date	End Date ⚙
☐	50002176	000 Security Guard	01.02.2018	31.12.99…
☐	50002177	000 Security Manager	01.02.2018	31.12.99…

Choose vacancies ✕

Save your entries with **Save** and click on the exit icon **<** to return to the SAP Easy Access screen.

Step 7: Enter Applicant Master Data

Task Enter the master data of an applicant.	**Time** 10 min

Short Description Use the SAP Easy Access Menu to enter the applicant master data.

Name (Position) Sang Cha (Personnel Administration Officer)

To enter the applicant's master data, follow the menu path:

Human Resources ► Personnel Management ► Recruitment ► Applicant Master Data ► Initial data entry

Menu path

In the upcoming screen *Initial entry of basic data*, please select **1ˢᵗ of the last month** for Start.

1ˢᵗ last month

In the area *Organizational Assignment*, choose personnel area **DL00,** personnel subarea **FI00** and applicant group **1**. The applicant is assigned to the applicant range **salaried employees** via F4 help and the personnel officer responsible for the application is **Chris Thomas**. Please fill out the fields gender, first name, last name, and birth date with data of your choice.

DL00
FI00
1
2
US1
Name and birth date

In the area *Application*, please search for the previously created job advertisement **Advertisement - ### Security Guard** via F4 help**.** Save your data with Save .

Advertisement - ### Security Guard

In the *Create Addresses* InfoType, enter optional data for **Street.** In the City field, enter **Dallas** and postal code **75201,** country **USA** and select **TX** as State. If necessary, use the F4 help. Save your data with [Save].

Dallas
75201
USA
TX

In the screen *Create Communication*, enter a fictional email address into the field **ID/number** (e.g. firstname.lastname@mailme.com). Save your data with **Save** and write down the applicant number displayed by the system in the status bar. Confirm any warning messages.

Applicant number: _____

Click on the exit icon **<** to return to the SAP Easy Access screen.

Step 8: Prepare Hiring

Task Prepare the applicant's hiring.	**Time** 10 min

Short Description Use the SAP Easy Access Menu to prepare the applicant's hiring.

Name (Position) Marco Romero (Recruiting Officer)

To prepare the applicant's hiring, follow the menu path.

Human Resources ▶ Personnel Management ▶ Recruitment ▶ Applicant Master Data▶ Applicant actions

Menu path

In the screen *Applicant Actions* please enter the **applicant number** which you have written down in the task before. The applicant shall be hired beginning from the **first of the last month**. Afterwards please highlight the applicant action **Prepare for hiring** and click on Execute .

Applicant number

1st last month

Prepare for hiring

Applicant no.:	1
Empl./appl.name:	Ms Savannah Richardson
App.group:	1 Active (external) Personnel area: DL00 GBI Dallas
App.range:	2 Salaried employees Overall status: 1 In process
*from:	01.02.2018

Applicant Actions

	Action Type	Personnel...
○	Initial entry of basic data	
○	Enter additional data	
○	Reject applicant	
○	Put applicant on hold	
○	Process applicant	
○	Offer applicant contract	
○	Applicant rejects offer	
●	Prepare for hiring	
○	Change of org. assignment	

Save Save the screen *Copy Applicant Actions* with all entered data and confirm the following warning message with Enter. Confirm the warning message saying that the planned operation lies in the future and close the screen *Planned activity: create* with Transfer .

Click on the exit icon ❮ to return to the SAP Easy Access screen.

☐

Step 9: Hiring Applicant

Task Hire the applicant.	**Time** 10 min

Short Description Use the SAP Easy Access Menu to hire the applicant.

Name (Position) Marco Romero (Recruiting Officer)

To hire the applicant, follow the menu path.

Human Resources ► Personnel Management ► Administration ► HR Master Data ► Personnel Actions

Please enter the **first of the last month** as the begin date, leave the field Personnel No. empty and confirm with Enter. Choose the personnel action **Hire Applicant** and enter the personnel area **DL00**, Employee Group **1** and Employee Subgroup **U4** in the fields next to the personnel action. Execute the personnel action by clicking on Execute .

From: 01.02.2018

Personnel Actions

	Action Type	Personnel...	EE group	EE subgr...
○	Time rec.(supplement)			
○	Hiring (TE mini master)			
○	Org.management (mini master)			
○	Time sheet (mini master)			
●	Hire applicant	DL00	1	U4
○				

In the screen *Direct Data Transfer*, please enter the **number of your applicant** and click on Transfer .

In the screen *Create Actions*, find the position **### Security Guard** with the help of the F4 help and the search term **###***.

Afterwards, please save Save your data.

Menu path

1st last month

Hiring with Data Transfer
DL00
1
U4

Applicant number

###*

Write down the new personnel number.

In the screen *Create Personal Data*, please enter the Social Security Number (SSN), enter the 9-digit number **918526###**. Please press Enter to confirm your entries. The other personal data have been transferred from the applicant data base. Please save Save the entries.

SSN

You can save Save the screen *Create Organizational Assignment* without any changes. Please confirm the upcoming window Delimit Vacancy with Yes .

You can save the screen *Create Addresses* without any changes. In the following screen *Tax Area*, please choose **TX** as tax area and press Enter.

Tax Area	Description	PostalCode	PostalCode	Start Date	End Date
FED	Federal	00000-0001	99999-9999	01.01.1980	31.12.9999
TX	State of Texas	73301-0000	88589-9999	01.01.1980	31.12.9999
TX01	Texarkana, Texas	73301-0000	88589-9999	01.01.1980	31.12.9999

Tax Area (1)   3 Entries found

Restrictions

Save `Save` the InfoType *Create Residence Tax Area* as well as the following two InfoTypes without any changes. The status bar indicates that the record has been created. Afterwards save the three tax-views again and accept any data overrides.

Save the screen *Create Bank Details* without any changes. Enter your system username as required in the last InfoType and save once again.

Change the *ID/number*, for example to **firstname.lastname@gbi.com**, since the status of the person changes from applicant to employee. Save `Save` the following InfoType *Communications*.

Click on the exit icon `<` to return to the SAP Easy Access screen.

 Step 10: Proof of the Hiring

Task Proof that the applicant was hired.   **Time** 5 min

Short Description Use the SAP Easy Access Menu to prove that the applicant was hired.

Name (Position) Chris Thomas (Human Resources Manager)

To prove the hiring, follow the menu path.

Human Resources ► Organizational Management ► Organizational Plan ► Organization and Staffing ► Display

Normally, you should be able to see your organizational unit **### Security** in the structure view. If not, please search for your organizational unit in the area **Find by** to display it I the structure view. Please take care that the Date and preview period starts on **January 1st of the current year** and lasts at least **one year**.

Security

1st current year
1 year

Staff assignments (structure)	Code	ID	Chief
∨ ■ 000 Security	000 Security	O 50000025	Mr Marcus Miller
∨ 👤 000 Chief Security Manager	000 CSM	S 50002175	
👥 Mr Marcus Miller	Miller	P 00000069	
∨ 👤 000 Security Guard	000 SG	S 50002176	
👥 Ms Savannah Richardson	Richardson	P 00000070	
👤 000 Security Manager	000 SM	S 50002177	

Now you can see that the hired applicant is assigned to the position **### Security Guard**. The green arrow in front of the position and person means that the position and the person have not been entered at the beginning of the Date and preview period but have been added in the course of time.

Click on the exit icon to return to the SAP Easy Access screen.

Step 11: Maintain Qualification Profile

Task Maintain the employee's qualification profile.	**Time** 5 min
Short Description Use the SAP Easy Access Menu to maintain the employee's qualification profile.	
Name (Position) Sang Cha (Personnel Administration Officer)	

To maintain the qualification profile, follow the menu path.

Human Resources ► Personnel Management ► Personnel Development ► Profile ►Change

With the help of the window **Find by**, please search for your employee working as Security Guard. Therefore, choose **Person ► Search Term** and type in the **last name** of your employee in the With name field. Choose your employee from the *Hit list* via double-clicking.

Last Name

On the right side of the screen, you can see employee's profile. The tab *Qualifications* is still empty as no qualifications for this employee have been maintained.

Now, please add a qualification by clicking [icon] below the table. Choose the tab *Structure Search* and expand **Certification**. Select **First Aid Certification** and confirm with [✓]. Change the start date to the **1ˢᵗ of the last month.**

Certification
First Aid Certification
1ˢᵗ last month

Save **Save** your entries and click on the exit icon [◄] to return to the SAP Easy Access screen.

Step 12: Execute Career Planning

Task Execute the career planning.

Time 5 min

Short Description Use the SAP Easy Access Menu to execute the career planning for an employee.

Name (Position) Sang Cha (Personnel Administration Officer)

To execute the career planning, follow the menu path.

Human Resources ▶ Personnel Management ▶ Personnel Development ▶ Planning ▶ Career

Menu path

Make sure that **Person** is selected. Enter the personnel number of the employee who is in charge of the **### Security Guard** position. As the reporting period, please choose the **current date** as the Key date. The planning criteria shall **include qualifications and careers** and. Press Execute .

Personnel number

Current date

Include qualifications
Include career

The career planning displays for which positions the qualifications and potentials of the employee are suitable and which careers the employee may follow.

The screen *Career Planning* presents all positions which the employee could theoretically fill.

For a detailed comparison of the qualifications of an employee with requirements of a listed position, please mark **### Security Manager** with the mouse and choose **Goto ► Profile Matchup.**

In the *Display Profile Matchup* screen, you realize that the employee can only meet parts of the position's requirements. Since a promotion based on the career regularly takes three years, try to promote the employee on the basis of his qualifications. In the course of an event, he already acquired the lacking certificate required for promotion, but this certificate has not been

entered into the system. Click on [icon] .

The employee shall be reserved for the position ### Security Manager as he or she shall follow the career for ### Security Guard. Therefore, please choose the target position and choose **Planning ▶ Create ▶ Designation**. It shall be valid from **today on**.

Today's date
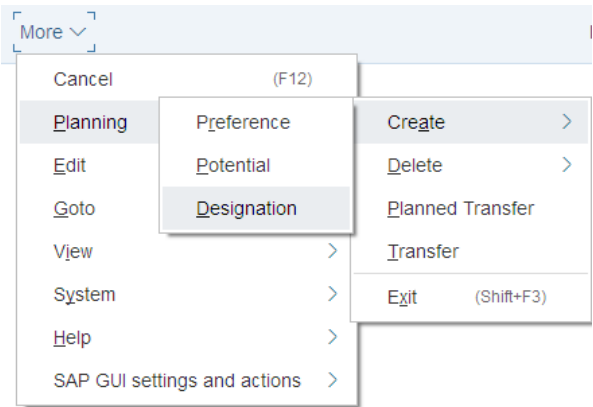
Click on the exit icon [icon] to return to the SAP Easy Access screen.

Step 13: Create an event

Task Create an event.	**Time** 10 min

Short Description Use the SAP Easy Access Menu to create an event. The missing certificate shall be added.

Name (Position) Sang Cha (Personnel Administration Officer)

To create the event, follow the menu path.

Human Resources ► Training and Event Management ► Business Events ► Business Event Menu

You can see the Business Event Menu for the current plan. There, please choose **GBI Training and Education → Security Training → GBI Security Training** and choose **Create w/o Resources** in the context menu being opened with a right mouse click.

In the screen *Create Business Event Without Resources*, enter **Monday of the last week** as the Start date and change the status into **Firmly bkd.**

Change the Name of the event to **### ST** and **### GBI Security Training**. Choose the location **Dallas** in the F4-help. Afterwards, please enter **1** as the minimum number of attendees, as the optimum and as the maximum number of attendees and save [Save] your event.

In the upcoming screen *Create User Schedule*, please enter a duration of **3 days** and **21 hours** in total in the *Without pattern* tab. The training shall start on a **Monday**. Confirm your entries with .

When opening the folder for the Security Training in the Dynamic Business Event Menu now, you should be able to see the event you just created.

Click on the exit icon to return to the SAP Easy Access screen.

Step 14: Book the event

Task Book the event.	**Time** 5 min

Short Description Use the SAP Easy Access Menu to book the event for your employee.

Name (Position) Sang Cha (Personnel Administration Officer)

To book the event, follow the menu path.

Human Resources ► Training and Event Management ►Attendance ► Attendance Menu

Menu path

The attendance menu is structured in the same way as the business event menu which you got to know in the previous task. Choose your event with the help of the path **GBI Training and Education → Security Training → ### Security Training** and choose **Book** from context menu being opened with a right mouse click.

ST

###

Book
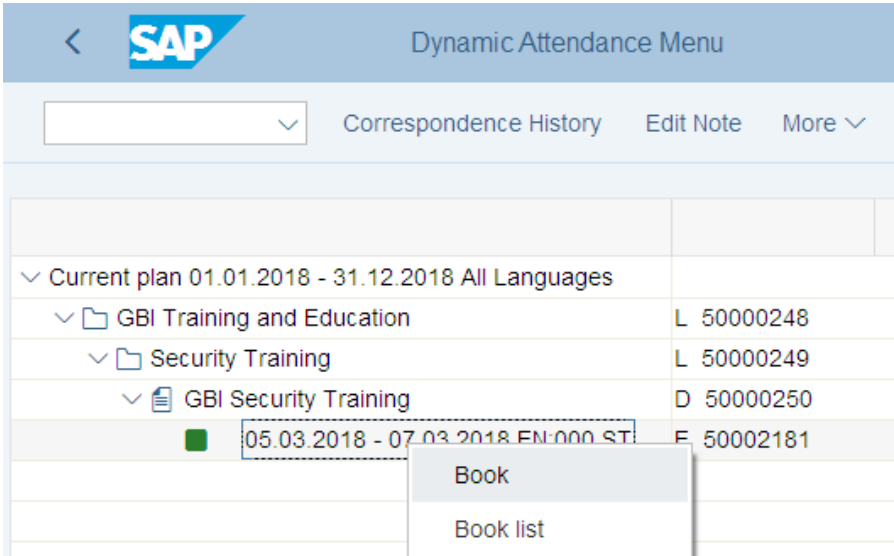
In the upcoming screen *Book Attendance: Data*, search for your employee, who is in charge of the **### Security Guard** position, with the help of the F4-help in the field Person.

Security Guard

Now, please click on and choose the settlement type

Free of charge. Close the window *Fee and Assignment* with and go back to the Attendance Menu. There, you can see that your employee was booked for the event.

Free of Charge

Click on the exit icon to return to the SAP Easy Access screen.

Step 15: Follow up the event

Task Follow up the event.	**Time** 5 min
Short Description Use the SAP Easy Access Menu to follow up the event.	
Name (Position) Sang Cha (Personnel Administration Officer)	

To follow-up the event, follow the menu path.

Human Resources ► Training and Event Management ► Business Events ► Business Event Menu

Hint to be able to successfully follow up an event it is necessary to mark it as fixed in the SAP system. Additionally, it is necessary to correct the period of time for the actual Plan Version.

To correct the period of time for the actual Plan Version, follow the menu path **Settings ► Change Settings** on the Menu Bar.

In the screen *Change User-Defined Settings* change to Dynamic Menus tab and navigate to Business event menu. Change the Period from **January 1st of the current year** to **December 31st of the current year** and check **Fixed Date**.
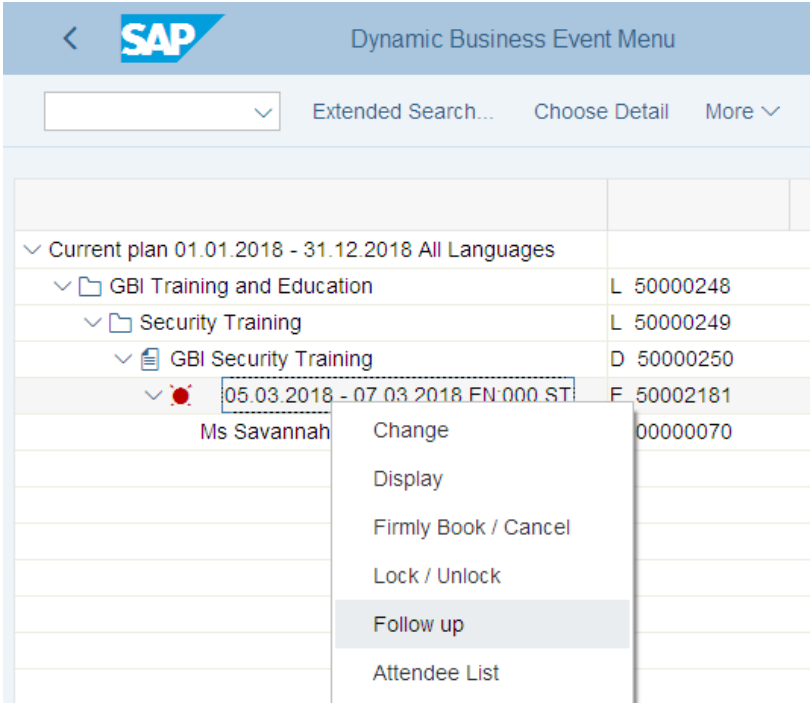
January 1st current year
December 31st current year
Fixed Date

Save your entries by clicking on Save . Return to the Business Event Menu.

Navigate to your event and choose **Follow up** from context menu being opened with a right mouse click. Make sure your employee really participated in the training.

Follow up

Afterwards, please start following up by clicking on [Data Screen] in the screen Follow up Business Event. You are guided to the follow up menu. Set the Proficiency to **Yes**. Your employee receives a new qualification in form of a certificate for attending the security training.

Yes
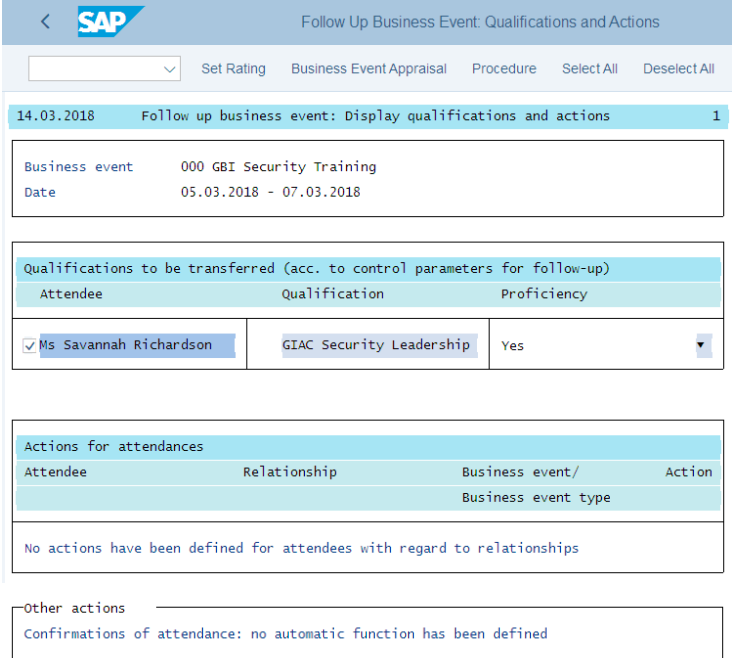
Please save [Save] the follow up and click on the exit icon [<] to return to the SAP Easy Access screen.

Step 16: Execute Career Planning

Task Execute the career planning.	**Time** 5 min

Short Description Use the SAP Easy Access Menu to execute the career planning for an employee.

Name (Position) Sang Cha (Personnel Administration Officer)

To execute the career planning, follow the menu path.

Human Resources ► Personnel Management ► Personnel Development ► Planning ► Career

Menu path

Make sure that **Person** is selected. Enter the personnel number of the employee who is in charge of the **### Security Guard** position. As the reporting period, please choose the **current date** as the Key date. The *planning criteria* shall **include qualifications and careers**. Press Execute .

Personnel Number

Current Date

Include qualifications
Include career

For a new, detailed comparison of the qualifications of the employee with the requirements of a listed position, please select **### Security Manager** with the mouse and choose **Goto ► Profile Matchup.**

Security Manager

This time, your employee meets all requirements.

Click on the exit icon [<] to return to the SAP Easy Access screen.

Step 17: Prepare Appraisal

Task Prepare an appraisal.   **Time** 5 min

Short Description Use the SAP Easy Access Menu to prepare the appraisal for an employee.

Name (Position) Sang Cha (Personnel Administration Officer)

To prepare the appraisal, follow the menu path.

Human Resources ▶ Personnel Management ▶ Personnel Development ▶ Appraisal ▶ Create

Menu path

Choose the Individual Appraisal **Individual Performance Appraisal**. It shall be valid for **one month** from **today** on. In order to define who should perform the appraisal for whom, please choose **Supervisor** and search for the person being in charge of the position of the **### Chief Security Manager** in the Structure Search in the field Person. Afterwards, please press Enter. The **To-Do List** with all employees, the Security Manager is able to appraise, is displayed. Please choose the employee, hired by you before, from the list and highlight the respective line.

Individual Performance Appraisal
One month from today on
Supervisor

Press to continue.

In the status bar, the message should be displayed.
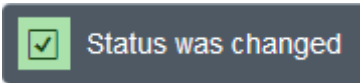
Click on the exit icon to return to the SAP Easy Access screen.

Step 18: Perform Appraisal

Task Perform an appraisal.	**Time** 10 min

Short Description Use the SAP Easy Access Menu to perform the appraisal for an employee.

Name (Position) Sang Cha (Personnel Administration Officer)

To perform the appraisal, follow the menu path.

Human Resources ▶ Personnel Management ▶ Personnel Development ▶ Appraisal ▶ Edit

In the Edit Appraisals Screens, please choose the Appraisal Model **Individual Performance Appraisal** in the F4-help. Moreover, choose a validity period of **today's date + 1 month**. In the Area *Objects Involved*, choose the employee being in charge of the **### Chief Security Manager** position as the **Appraiser** and the employee being in charge of the **### Security Guard** position as the **Appraisee**. Please select the Appraisal Status **In Process** as a selection criterion and press Perform .

50000000
One month from today on

CSM
SG
In Process

	Edit Appraisals		
	Perform More ∨		Exit

Appraisal model: 50000000   Individual Performance Appraisal
More... Selection Criteria: ⬚

Period appraised: 14.03.2018   to: 14.04.2018
Created on: _____   To: _____

Objects Involved

Appraiser
P Person   00000069   Mr Marcus Miller
● AND

Appraisee   ○ OR
P Person   00000070   Ms Savannah Richardson

☐ Without appraisal   ☐ Display existing

Appraisal Status
☐ In Preparation   ☑ In Process
☑ Completed   ☑ Approved   ☑ Rejected

☑ Individual and overall appraisals   ☐ Subappraisals

The list in the upcoming screen should include your prepared appraisal.

Please highlight the respective line and press Change . In the following screen *Individual Performance Appraisal*, you can see all goals, the employee shall reach.

I...	Name	Weight...
	Individual Performance Appraisal	
	1. Timeliness	1,00
	2. Flexibility	1,00
	3. Interpersonal Skills	1,00
	4. Fitness	1,00

In order to complete the individual performance appraisal, please fill the row **Ratings** with individual appraisals of your choice with a scale ranging from very good to unsatisfactory. Thereby, you act as the Chief Security Manager.

Afterwards, please press Complete .

Ratings

Click on the exit icon < to return to the SAP Easy Access screen.

Step 19: Transfer of Employee

Task Transfer your employee.	**Time** 5 min
Short Description Use the SAP Easy Access Menu to transfer your employee to the position of the Security Manager.	
Name (Position) Chris Thomas (Human Resources Manager)	

To transfer an employee, follow the menu path.

Human Resources ► Organizational Management ► Organizational Plan ► Organization and Staffing ► Change

Menu path

In the screen *Organization and Staffing Change* you can see the Staff Assignments for your ### Security department. Your employee hired after the application process has now the position of the Security Guard.

	Staff assignments (structure)	Code	ID	Chief
☐	⌄ ▪ 000 Security	000 Security	O 50000025	Mr Marcus Miller
☐	⌄ 👤 000 Chief Security Manager	000 CSM	S 50002175	
☐	👥 Mr Marcus Miller	Miller	P 00000069	
☐	⌄ 👤 000 Security Guard	000 SG	S 50002176	
☐	👥 Ms Savannah Richardson	Richardson	P 00000070	
☐	👤 000 Security Manager	000 SM	S 50002177	

Now pull your employee with Drag & Drop on the vacant position of the Security Manager.

This produces the screen *Person Assign*. Enter the **First of the actual month** as Valid from **100%** as Staffing Percentage. Choose **Job Conversion** as Action. Select the position of the Security Guard to set dates for relationship.

1st current month
100%
Job Conversion

Compare your entries with the following screenshot and click on [Continue].

Set dates for relationship

Set the vacancy for the position as Security Guard to the actual date. In addition, you delimit the position as Security Manager to the first of the actual month. To do so confirm the upcoming dialog with a click on Yes .

You can now see that your employee directly has been moved from the position of the Security Guard to the position of the Security Manager.

	Staff assignments (structure)	Code	ID	Chief
☐	⌄ ■ 000 Security	000 Security	O 50000025	Mr Marcus Miller
☐	⌄ 👤 000 Chief Security Manager	000 CSM	S 50002175	
☐	👥 Mr Marcus Miller	Miller	P 00000069	
☐	👤 000 Security Guard	000 SG	S 50002176	
☐	⌄ 👤 000 Security Manager	000 SM	S 50002177	
☐	👥 Ms Savannah Richardson	Richardson	P 00000070	

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

☐

HCM I Challenge

Learning Objective Understand and perform an integrated recruitment process. **Time** 75 min

Motivation Having successfully completed the case study *Human Capital Management I*, you should be able to perform the following task independently.

Scenario In a growing company, safety needs to be guaranteed not only for buildings, but also for employees, customer data, company secrets and all facilities. To be prepared for these future requirements, the security department of Global Bikes is meant to be restructured on the **1st day in six months**. For this purpose, you are supposed to create two new subordinate organizational units within the security department for the U.S. company code. The first one is called ### Plant Security and is responsible for the maintenance of security and order for the prevention of dangers and damages threatening the company and its employees. The second one is called ### IT Security and is responsible for data security and data safety.

For the management and coordination of your superordinate organizational unit ### Security, the new position ### Chief of Security is meant to be created. The precondition for the position is a master's degree in security management. Since the ongoing ### Chief Security Manager has obtained this degree via distance learning alongside his job commitments, he will be promoted to this new position. The position of the ### Chief Security Manager will thus be terminated immediately. Your ### Security Manager will be removed to the identically named post within the newly created organizational unit ### Plant Security. Subsequently, please hire a new employee for the still vacant position of the ### Security Guard in plant security. For ### IT Security, two new positions ### Senior IT Admin and ### Junior IT Admin will be created. Please fill these positions with two new employees with pronounced IT capabilities. The future holder of the position ### Senior IT Admin furthermore needs to have a bachelor's degree in IT security. Both the ### Senior IT Admin and the position of the ### Chief Security Manager are Head of their own organizational unit. For hiring the new employees, please use 651783###, 651784### and 651785### as social security number.

Task Information Since this task is based on the case study *Human Capital Management I*, you are allowed to use it for support. It is however recommended to solve this advanced task without support to test the newly gained knowledge.

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