

# Human Capital Management (HCM I)

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

#### **Product**

S/4HANA 2022 Global Bike

Fiori 3.0

#### Level

**Beginner** 

#### **Focus**

**HCM** 

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#### Version

4.2

#### **Last Update**

August 2023

#### 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.

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

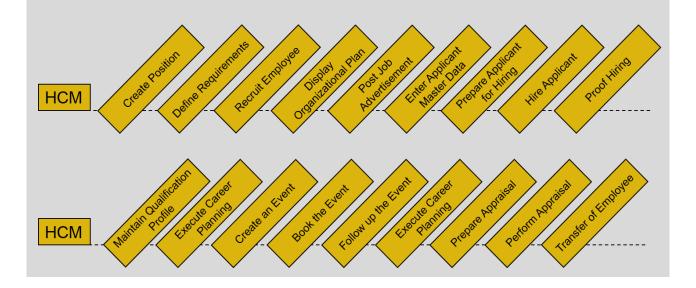
**Scenario** In the Global Inc. in Dallas, a new security department will be equipped with three positions. You, as an employee in Human Resources are responsible for maintaining the data of the new employees in the system and for hiring a new employee in the course of a recruiting process. Through additional 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 Administrator)

Chris Thomas (Head of Human Resources)

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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HCM I Challenge	



## Step 1: Create Positions

**Task** Create positions within the organizational structure.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad 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, use in the *Human Capital Management* area on the *Personnel Management* page in the *Recruiting Officer* role the app *Organizational Management*.

Fiori App



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.

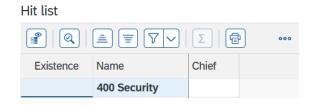
1<sup>st</sup> last month One year

Start date	07/01/2023	
Preview period to		
Time period	1 Y Years vin the future	
End Date		
Pi	eview period from: 07/01/2023	
	to: 06/30/2024	
		© X

**Note** While positions represent the concrete owner-occupying positions within a company (for example purchasing agents), locations are general classifications of functions within a company (e.g., clerks) to be specified by the assignment of properties. They provide job descriptions that apply to several positions with comparable tasks and characteristics. After you create a job, you must specify the number of corresponding positions required in the organization. A position inherits the tasks of a job. However, you can define additional tasks that must be performed only by this position.

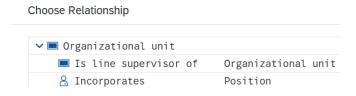
The positions should be created in the department ### Security, ### being replaced by your group/computer number. Therefore, please go to the window *Find by* on the left side of the screen. There, click on **Organizational Unit** → Search Term, enter the search term ### Security in the *with name* entry field and press Find. The search result should be displayed in the Hit list window on the left side of the screen.

### Security



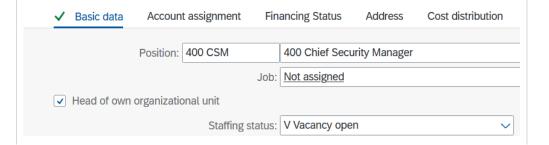
Please choose your organizational unit via double-clicking so that it appears on the right side of the screen. Highlight your organizational unit and click on in the context menu.

In the upcoming screen *Choose Relationship*, please choose *Incorporates*.



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.

### CSM ### Chief Security Manager Head of unit



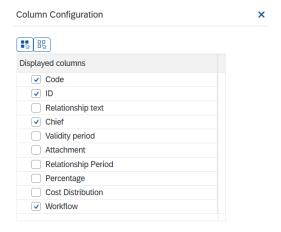
Enter 1<sup>st</sup> of the last month as Valid from. If this field should be greyed out, please click on Display key date. The functionality should be available then.

1st of the last month

Press Save to save your new job position. As you may have noticed, the overview area has already updated during the editing.



If you do not see the columns Code and ID, you can insert them by pressing and choosing the respective columns. Continue with  $\checkmark$ .



The selected columns will be displayed in the overview.

	Staff assignments (structure)	Code	ID	Chief
	✓ ■ 400 Security	400 Security	O 50000602	400 Chief Security Manager
<b>~</b>	400 Chief Security Manager	400 CSM	S 50004335	

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. Don't select the Head of own organizational unit button.

As position, please choose ### SG and as name ### Security Guard.

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

1st of the last month

### SG ### Security Guard

### SM ### Security Manager

Staff assignments (structure)	Code	ID	Chief		
✓ ■ 400 Security	400 Security	O 50000602	400 Chief Security Manager		
400 Chief Security Manager	400 CSM	S 50004335			
400 Security Guard	400 SG	S 50004336			
400 Security Manager	400 SM	S 50004337			
Click on to return to the SAP Fiori Launchpad.					



## Step 2: Define Requirements

**Task** Define requirements for positions.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to define necessary qualifications/requirements for positions.

Name (Position) Marco Romero (Recruiting Officer)

To define the requirements for a position, use in the *Human Capital Management* area on the *Personnel Management* page in the *Recruiting Officer* role the app *Define Requirements*.

Fiori App



In the screen *Find by*, expand **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. Confirm with  $\checkmark$  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.

Hit list



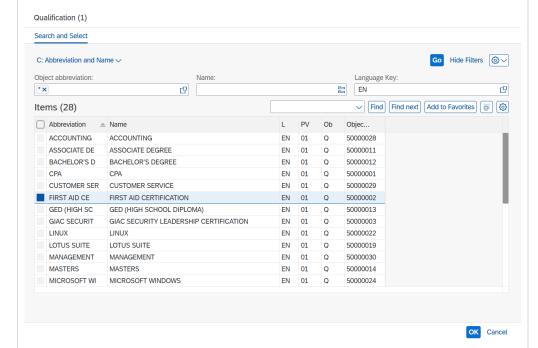
A list of requirements is displayed in the right part of the screen.



Click on in order to define further requirements for the position.

In the popup window 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 of to display all possible qualifications.

Search for **First Aid Certification** in the list and add the qualification to your job position by double-clicking on it. Repeat the process for the **GIAC Security Leadership Certification** qualification.



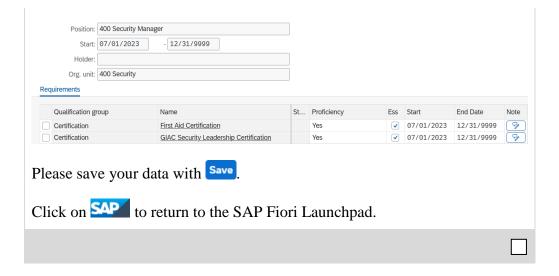
For both entries, please type in **Yes** in the *Proficiency* column since these qualifications imply certificates which employees may earn. Label both requirements as **Ess** by placing a checkmark within the particular qualifications and choose the **1**<sup>st</sup> of the last month as the beginning.

\* EN

First Aid Certification GIAC Sec. L. Cert.

Yes

Ess 1st last month





## Step 3: Hire Employee

**Task** Hire an employee for the new position.

Time 15 min

**Short Description** Use the SAP Fiori Launchpad in order to hire an employee for the new security department.

Name (Position) Marco Romero (Recruiting Officer)

To hire the employee, use in the *Human Capital Management* area on the *Personnel Management* page in the *Recruiting Officer* role the app *Hire Employee*.

Fiori App



**Note** Employees hold positions in the organizational structure that is governed by Organizational Management.

Please enter the 1<sup>st</sup> 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 Global Bike Dallas as the personnel area, Active [1] as employee group and Salaried Employees [U4] as employee subgroup via ...

1st last month

DL00 1 U4

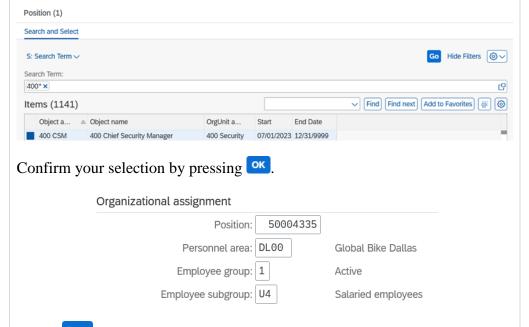
	Personnel no.:			
	From: 07/01/2023			
Per	sonnel Actions			
	Action Type	Personn	EE group	EE subgr
$\circ$	Hiring			
$\bigcirc$	Organizational reassignment			
$\bigcirc$	Transfer (EDP) - active			
$\circ$	Transfer (EDP) - retiree			
$\circ$	Change in pay			
$\bigcirc$	Early retirement/retirement			
$\circ$	Leaving			
$\circ$	Reentry into company			
$\bigcirc$	Time recording (mini master)			
$\bigcirc$	Time rec.(supplement)			
•	Hiring (TE mini master)	DL00	1	U4

### Chief Security Manager

© SAP UCC Magdeburg

In the popup that opens, replace the search term with ###\* and then select the ### Chief Security Manager.

###\*
### Chief Security
Manager



Personnel number:

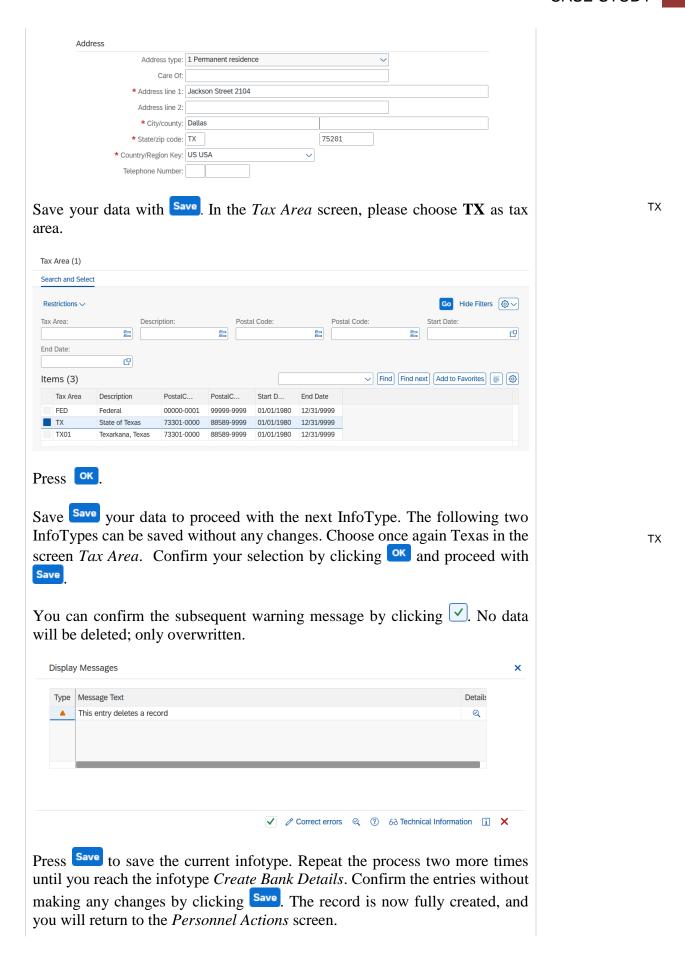
Please Save your data. You will automatically be taken to the next InfoType. Write down the Personnel Number of your employee, stated at the top of the screen in the field Personnel No.

**Note** Personal information, such as last name, first name, and date of birth, is defined in data fields. Data fields are grouped into data groups or information units according to their content. In Human Resources, these information units are called information types or infotypes for short. Employees infotypes are managed in Personal Admiration and are linked to the organizational plan via their positon assignment.

In the *Create Personal data* screen, enter a **Titel, Last Name, First 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.

Titel Last Name First Name Date of Birth SSN

< SAP	Create Personal data	Search In: "Apps"	
Menu ✓ 🐔 [	<u> </u>		
Personnel	No: 1094		
Personnel * Star	t: 07/01/2023 * To: 12/31/9999		
Name			
	Title: Mrs V ame: Schmidt	Name Format:	
	ame: Anja	Birth name:	
Middle n		Initials:	
Designa	tion:	Nickname:	
	uffix:		
N	ame:		
HR data			
	* SSN: 618253400	Gender: 2 Female	
* Dat	e of Birth: 08/05/1973		
	anguage: EN English		
	ationality: V		
Then, say	ve Save your data. You will a	utomatically be taken to the next	
InfoType	•	•	
In the Cre	eate Organizational assignment s	screen, define <b>EX00</b> as subarea.	EX00
Enterprise			
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(	Cost Ctr:	Bus. Area: BI00 Bikes	
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	the data and choose to com	firm the selection of your position's	
vacancy.			
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In the nex	at window, choose (1) Permaner	<b>nt residence</b> as the subtype for the	Permanent residence
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	otype "Addresses" (1)		
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3 Ho	me address		
In the Cra	eate Addresses screen enter ontic	onal data for Street. In the City field	Street
	las, select <b>TX</b> as State and postal		Dallas
	m, silili =12 ms simo mia posta		TX 75201



Click on to return to the SAP Fiori Launchpad.	



## Step 4: Display Organizational Plan

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

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to display the modified organizational plan of the Administration department.

Name (Position) Sang Cha (Personnel Administrator)

To display the changes in the organizational plan, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Display Organizational Plan*.

Fiori App

Display Organizational Plan



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.

### Security

	Staff assignments (structure)	Code	ID	Chief	Workf
<b>✓</b>	✓ ■ 400 Security	400 Security	O 50000602	Mrs Anja Schmidt	
	→   ▲ 400 Chief Security Manager	400 CSM	S 50004335		
	A Mrs Anja Schmidt	Schmidt	P 00001094		
	400 Security Guard	400 SG	S 50004336		
	400 Security Manager	400 SM	S 50004337		

Click on to return to the SAP Fiori Launchpad.





## Step 5: Post Job Advertisement

Task Post a job advertisement.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to post a job advertisement.

Name (Position) Marco Romero (Recruiting Officer)

To post a job advertisement, use in the *Human Capital Management* area on the *Personnel Management* page in the *Recruiting Officer* role the app *Post Job Advertisement*.

Fiori App



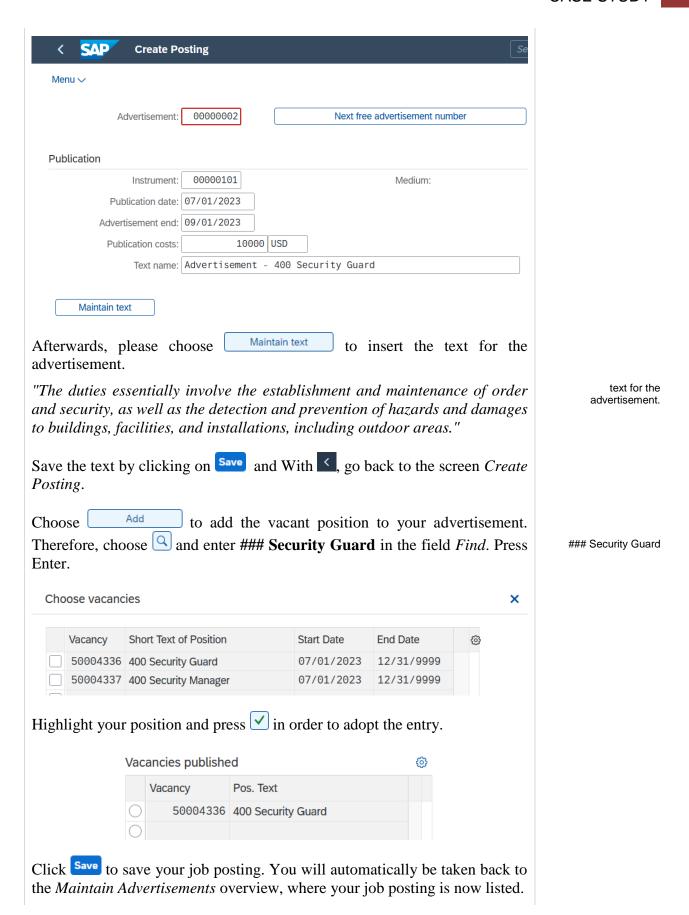
In the upcoming screen *Postings*, please click Execute in order to view all existing advertisements.

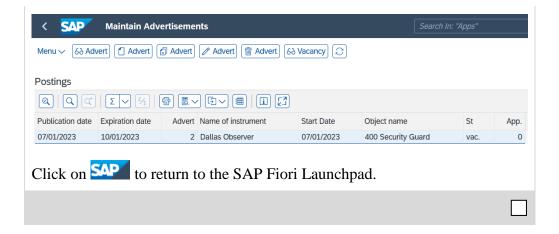
In the screen *Maintain Advertisements*, choose Advertisement to create a new advertisement. Assign a new Advertisement Number by clicking on Next free advertisement number

As Recruitment Instrument the company has chosen the **Dallas Observer** and the advertisement has been published on 1<sup>st</sup> of the last month. The advertisement end is planned for the 1<sup>st</sup> 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 1<sup>st</sup> last month 1<sup>st</sup> following month

10.000 USD Advertisement - ### Security Guard







## Step 6: Enter Applicant Master Data

**Task** Enter the master data of an applicant.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to enter the applicant master data.

Name (Position) Sang Cha (Personnel Administrator)

To enter the applicant's master data, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Enter Applicant Master Data*.

Fiori App



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

1st last month

< SAP Initial entry of basic data	
Menu ✓ ( The Former applicant/former employee) ( The State of the Sta	Save+add.data In process Put on hold Reject
App.no:	
App.status: In process	* Start Date: 07/01/2023
Stat.rea.	Reference available
Pers. No.:	Assign facsimiles

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 drop down menu and the personnel officer responsible for the application is **Chris Thomas**.

DL00 FI00 1 2 US1

Organizational As	signment		
* Pers.area:	DL00	P. Subarea: F:	000
* App.group:	1	App.range: 2	
Pers.off.:	US1		Further data

In the area *Application*, please search in the field *Advert* for the previously created job advertisement **Advertisement - ### Security Guard** .

Advertisement - ### Security Guard

Application					
Advert	:: 2			Public.	date: 07/01/2023
UnsAppGp	):	,			Further data
		and <b>Last name</b> , a/Address with d			
ne languag	e.				
Personal Data / A					
Title:			○ Female	Male	Unknown
Last Name:			Bt. name		
First Name:			Language		
Birth date:	03/15/1980		Nation.	:	Further data
SSN:					
Street:					
2nd add.ln:			Tel. no.	:	
Cty/St/PCd:			Country	: US	Further data
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Titel Last Name First Name Birth date Gender Englisch

> Dallas 75201 USA TX

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field **ID/number** (e.g. firstname.lastname@mailme.com). Save your data with

and write down the applicant number displayed by the system in the status bar. Confirm any warning messages.	•
You will receive the following success message:	
Action Initial entry of basic data for applicant 00000002 executed	
Write down your Applicant number:	
Click on to return to the SAP Fiori Launchpad.	
	]



## Step 7: Prepare Hiring

**Task** Prepare the applicant's hiring.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to prepare the applicant's hiring.

Name (Position) Marco Romero (Recruiting Officer)

To prepare the applicant's hiring, use in the *Human Capital Management* area on the *Personnel Management* page in the *Recruiting Officer* role the app *Prepare Hiring*.

Fiori App



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**.

Applicant number

1<sup>st</sup> last month Prepare for hiring

	Applicant no.:	2				
	Empl./appl.name:	Mr Marc William	S			
	App.group:	1 Active (external)		Personnel	area: DL00	Global Bike Dallas
	App.range:	2 Salaried employe	ees	Overall s	tatus: 1	In process
	* from:	07/01/2023				
App	olicant Actions			<b>©</b>		
	Action Type		Personne			
$\bigcirc$	Initial entry of basic of	data				
$\bigcirc$	Enter additional data			_		
$\bigcirc$	Reject applicant			_		
$\bigcirc$	Put applicant on hold	t		_		
$\bigcirc$	Process applicant					
$\bigcirc$	Offer applicant contra	act				
$\bigcirc$	Applicant rejects offe	r				
•	Prepare for hiring					
	Change of org. assign	nment				

and click on . Save Save the screen <i>Copy Applicant Actions</i> 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 <i>Planned activity: create</i> with .  Click on SAP to return to the SAP Fiori Launchpad.



## Step 8: Hiring Applicant

**Task** Hire the applicant.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to hire the applicant.

Name (Position) Marco Romero (Recruiting Officer)

To hire the applicant, use in the *Human Capital Management* area on the *Personnel Management* page in the *Recruiting Officer* role the app *Hire Employee*.

Fiori App

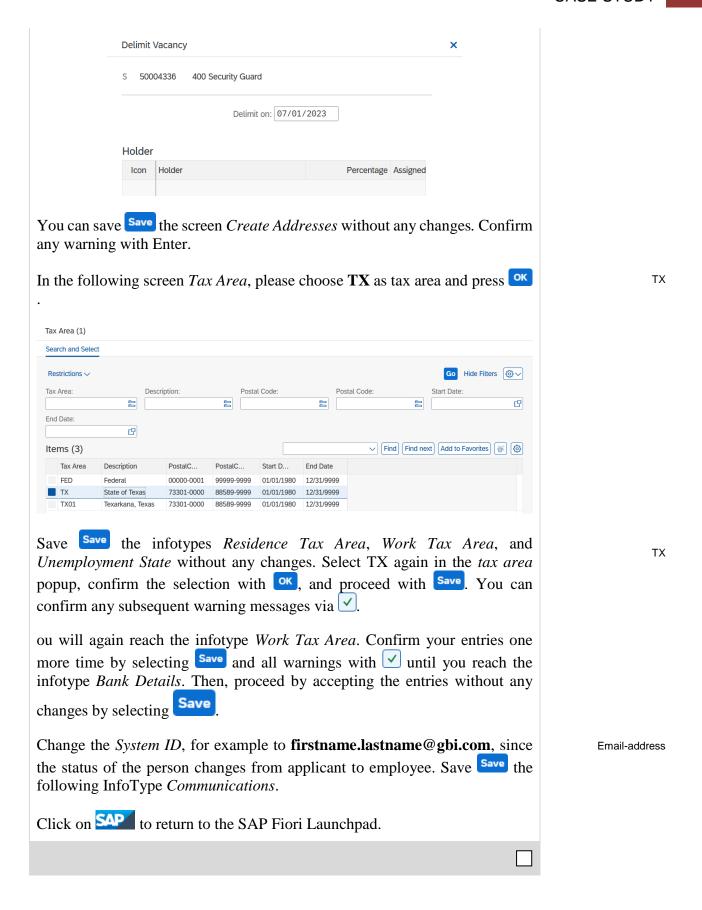


Please enter the **first of the last month** as the begin date, leave the field Personnel No. empty and confirm with Enter. Choose the personnel action **Hire Applicant** and enter the personnel area **DL00**, Employee Group **1** and Employee Subgroup **U4** in the fields next to the personnel action.

1<sup>st</sup> last month
Hiring with Data Transfer
DL00
1
U4

	Personnel no.:			
	From: 07/01/2023			
Per	sonnel Actions			
	Action Type	Personn	EE group	EE subgr
$\bigcirc$	Hiring			
$\bigcirc$	Organizational reassignment			
$\bigcirc$	Transfer (EDP) - active			
$\bigcirc$	Transfer (EDP) - retiree			
0	Change in pay			
$\bigcirc$	Early retirement/retirement			
0	Leaving			
0	Reentry into company			
0	Time recording (mini master)			
0	Time rec.(supplement)			
0	Hiring (TE mini master)			
0	Org.management (mini master)			
$\bigcirc$	Time sheet (mini master)			
•	Hire applicant	DL00	1	U4

Execute the personnel action by clicking on ©. In the screen Direct Data Transfer, please enter the number of your Applicant number applicant and click on Transfer SAP **Direct Data Transfer** Menu ∨ Transfer \* Applicant no.: | 00000002 Repeat Suppress dialog **Note** If your Applicant is locked, please log out of the system and log in again. In the screen Create Actions, find the position ### Security Guard with the ### Security Guard help of the F4 help and the search term ###\*. Organizational assignment Position: 50004336 Personnel area: DL00 Global Bike Dallas Employee group: 1 Active Employee subgroup: U4 Salaried employees Afterwards, please save Save your data. Write down the new personnel number. Personnel number: In the screen Create Personal data, please enter the Social Security Number 918526### (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. You can save Save the screen Create Organizational assignment without any changes. Please confirm the upcoming window *Delimit Vacancy* with Yes.





## Step 9: Proof of the Hiring

**Task** Proof that the applicant was hired.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to prove that the applicant was hired.

Name (Position) Chris Thomas (Head of Human Resources)

To prove the hiring, use in the *Human Capital Management* area on the *Personnel Management* page in the *Head of Human Resources* role the app *Proof Hiring*.

Fiori App





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. You can now see that the assigned employee holds the position ### *Security Guard* within the organizational structure of the Global Bike Corporation.

### Security

	Staff assignments (structure)	Code	ID	Chief
<b>✓</b>	✓ ■ 400 Security	400 Security	O 50000602	Mrs Anja Schmidt
	√	400 CSM	S 50004335	
	😤 Mrs Anja Schmidt	Schmidt	P 00001094	
	400 Security Guard	400 SG	S 50004336	
	😤 Mr Marc Williams	Williams	P 00001095	
	400 Security Manager	400 SM	S 50004337	

Click on to return to the SAP Fiori Launchpad.



## Step 10: Maintain Qualification Profile

**Task** Maintain the employee's qualification profile.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to maintain the employee's qualification profile.

Name (Position) Sang Cha (Personnel Administrator)

To maintain the qualification profile, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Define Requirements*.

Fiori App



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.

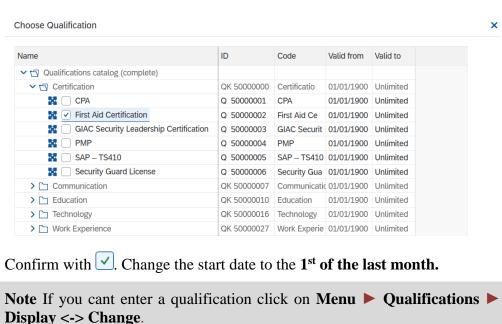
Last Name

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.



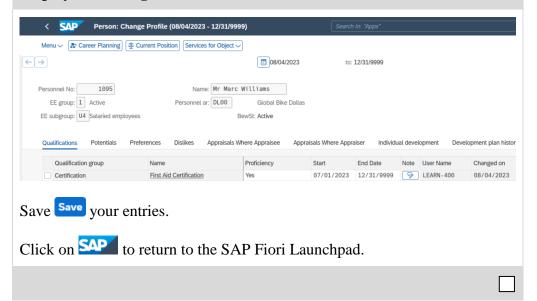
Now, please add a qualification by clicking below the table. Choose the tab *Structure Search* and expand **Certification**. Select **First Aid Certification**.

Certification First Aid Certification



1st last month

Display <-> Change.





## Step 11: Execute Career Planning

Task Execute the career planning.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to execute the career planning for an employee.

Name (Position) Sang Cha (Personnel Administrator)

To execute the career planning, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Execute Career Planning*.

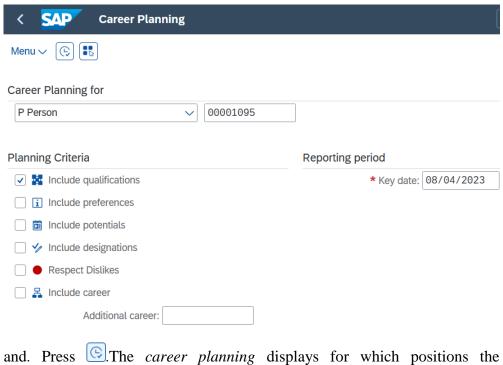
Fiori App



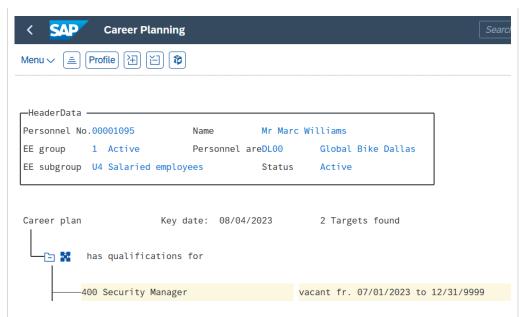
Make sure that **P Person** is selected. Enter the personnel number of the employee. Search this number via the *Last Name* – *First Name* tab in the  $\square$ . As the reporting period, please choose the **current date** as the Key date. The planning criteria shall **include qualifications**.

Personnel number

Current date Include qualifications

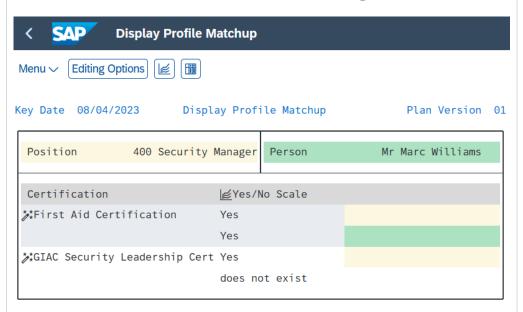


and. Press . The *career planning* displays for which positions the qualifications and potentials of the employee are suitable and which careers the employee may follow.



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 Menu > 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

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 Menu ▶ Planning ▶ Create ▶ Designation.

The Period shall be valid from **today on**. Confirm with .

Period 
\* Start date: 08/04/2023

\* End Date: 12/31/9999

Click on 
to return to the SAP Fiori Launchpad.

Today's date



#### Step 12: Create an event

Task Create an event.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to create an event. The missing certificate shall be added.

Name (Position) Sang Cha (Personnel Administrator)

To create the event, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Create event*.

Fiori App

Create event

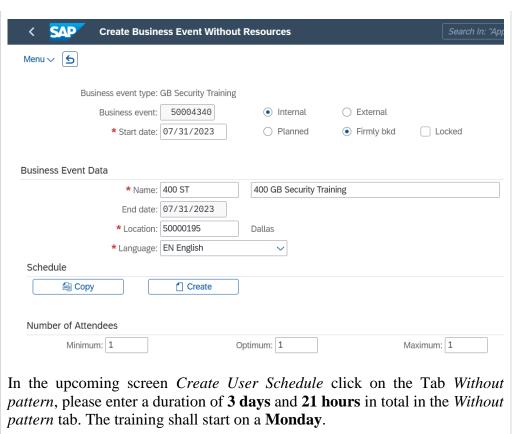


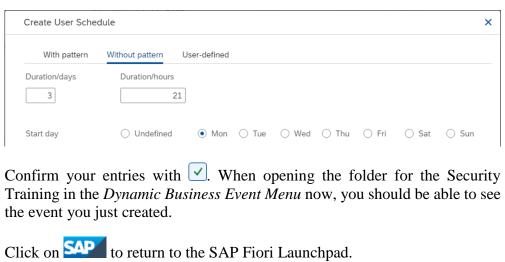
You can see the Business Event Menu for the current plan. There, please choose GB Training and Education → Security Training and select GB Security Training. Then choose the menu path Menu ▶ Business Event ▶ Dates ▶ Create Without Resource.

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.** 

Monday of last week Firmly booked

> ### ST ### GB Security Training Dallas





3 days 21 hours Monday



## Step 13: Book the event

Task Book the event.

Time 5 min

**Short Description** Use the SAP Fiori App to book the event for your employee.

Name (Position) Sang Cha (Personnel Administrator)

To book the event, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Book the event*.

Fiori App

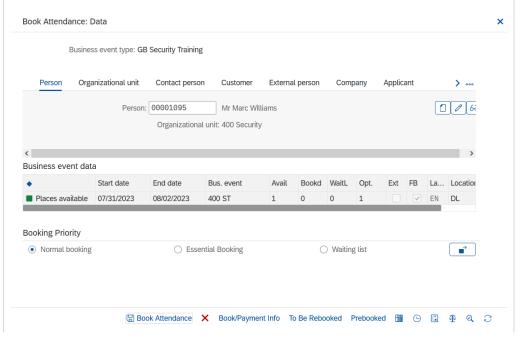


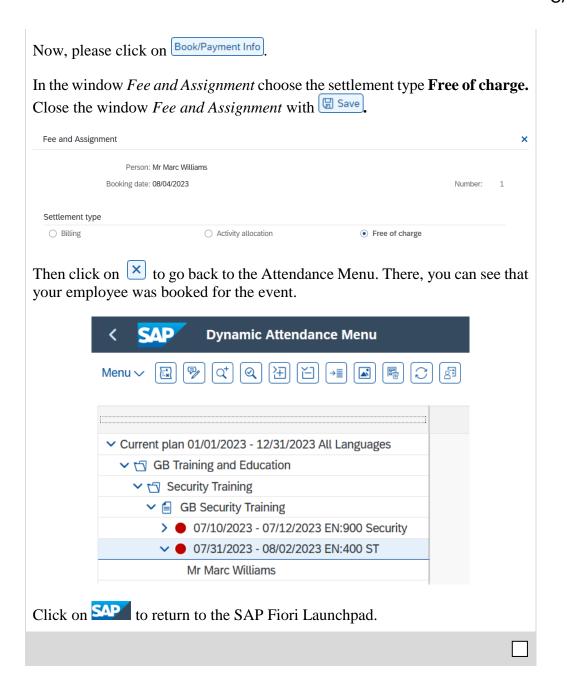
The attendance menu is structured in the same way as the business event menu which you got to know in the previous task. Choose your event with the help of the path GB Training and Education → Security Training → GB Security Training and select your Event ### ST. Then choose the menu path Menu ► Attendance ► Book.

### ST Book

In the upcoming screen *Book Attendance: Data*, search for your employee in the field *Person*, who is in charge of the ### **Security Guard** position, with the help of the  $\Box$  in the *Last name* – *First name* tab.

### Security Guard





Free of Charge



## Step 14: Follow up the event

Task Follow up the event.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to follow up the event.

Name (Position) Sang Cha (Personnel Administrator)

To follow-up the event, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Follow up the event.* 

Fiori App

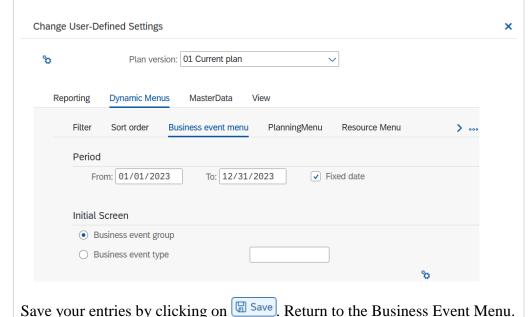


**Hint** to be able to successfully follow up an event it is necessary to mark it as fixed in the SAP system. Additionally, it is necessary to correct the period of time for the actual Plan Version.

To correct the period of time for the actual Plan Version, follow the menu path Menu ▶ 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 1<sup>st</sup> of the current year** to **December 31<sup>st</sup> of the current year** and check **Fixed Date**.

January 1<sup>st</sup> current year December 31<sup>st</sup> current year Fixed Date

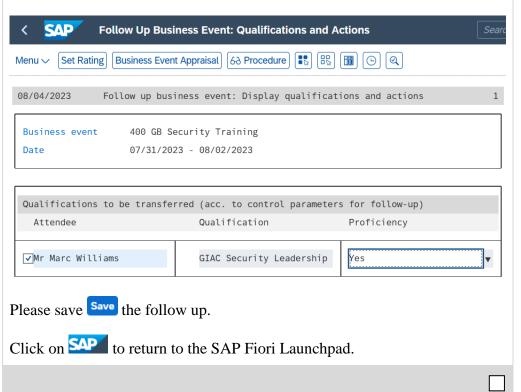


Back on the Dynamic Business Event Menu select your event.



Choose the menu path **Menu** ▶ **Business Event** ▶ **Follow up**. Make sure your employee really participated in the training.

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



## Step 15: Execute Career Planning

Task Execute the career planning.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to execute the career planning for an employee.

Name (Position) Sang Cha (Personnel Administrator)

To execute the career planning, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Execute Career Planning*.

Fiori App

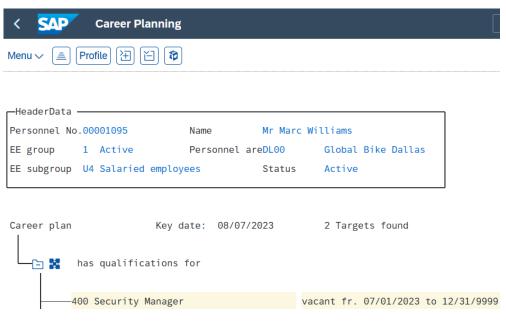


Make sure that **Person** is selected. Enter the personnel number of the employee who is in charge of the ### **Security Guard** position. Alternatively, you can use  $\Box$  and search for your employee by their organizational unit.

As the reporting period, please choose the **current date** as the Key date. The *planning criteria* shall **include qualifications**. Press .

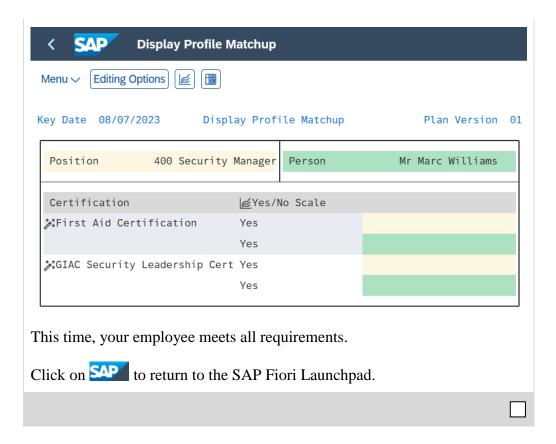
Personnel Number

Current Date Include qualifications



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

### Security Manager





## Step 16: Prepare Appraisal

Task Prepare an appraisal.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to prepare the appraisal for an employee.

Name (Position) Sang Cha (Personnel Administrator)

To prepare the appraisal, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Prepare Appraisal*.

Fiori App



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

< SAP	Generate 'To-Do'	List	
Menu V			
	Individual appraisal:	Individual Performa	nce Appraisal
	Period appraised:	07/01/2023	to: 08/07/2023
Supervisor			○ Employee
To do' list startir	ng from	00001094	

Next, press Refresh. As a result, the workload will be displayed, which includes all employees for whom the supervisor can provide an assessment.

Select your employee for the position ### Security Guard from there and press Complete Preparation to conclude the assessment planning. A corresponding system message will appear in the status bar.
Click on SAP to return to the SAP Fiori Launchpad.



## Step 17: Perform Appraisal

Task Perform an appraisal.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to perform the appraisal for an employee.

Name (Position) Sang Cha (Personnel Administrator)

To perform the appraisal, use in the *Human Capital Management* area on the *Personnel Management* page in the *Personnel Administrator* role the app *Perform Appraisal*.

Fiori App



In the *Edit Appraisals* screen, please choose the Appraisal Model **Individual Performance Appraisal** via . The assessment period should cover the timeframe from the **1st of last month to today**.

50000000 1st of last month to today

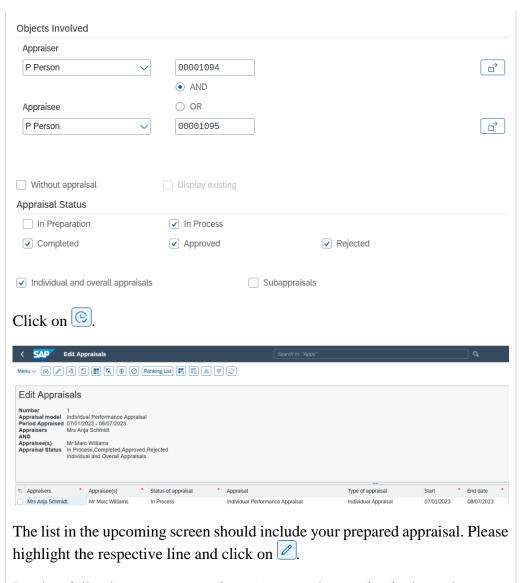
< SAP Edit Appraisals	
Menu ✓ 🕞	
Annual of the 1st   50000000	
Appraisal model: 50000000	
More Selection Criteria:	
Period appraised: 07/01/2023	to: 08/07/2023
Created on:	То:

As a Objects Involved, select **Person** for the Appraiser and enter the employee's **personnel number** who occupies the position of ### Chief Security Manager. Choose **Person** for the Appraisee and enter the **personnel number** of the employee who occupies the position of ### Security Guard. Please select the Appraisal Status **In Process** as a selection criterion.

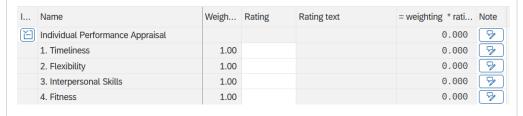
Person Personnel number

Person Personnel number

In Process



In the following screen *Perform Appraisal - Individual Performance Appraisal*, you can see all goals, the employee shall reach.



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

l	Name	Weigh	Rating	Rating text	= weighting * rati	Note
Y	Individual Performance Appraisal				0.000	8
	1. Timeliness	1.00	2		0.000	8
	2. Flexibility	1.00	1		0.000	8
	3. Interpersonal Skills	1.00	1		0.000	8
	4. Fitness	1.00	2		0.000	8

Ratings

The fields also provide you with the opportunity to add explanations the assessment, detailing why a particular rating was given, for instance.	s to
Afterwards, please click on Complete.	
Appraisal "Individual Performance Appraisal" completed successfully	
Click on SAP to return to the SAP Fiori Launchpad.	



## Step 18: Transfer of Employee

Task Transfer your employee.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to transfer your employee to the position of the Security Manager.

Name (Position) Chris Thomas (Head of Human Resources)

To transfer an employee, use in the *Human Capital Management* area on the *Personnel Management* page in the *Head of Human Resources* role the app *Organizational Management*.

Fiori App



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.

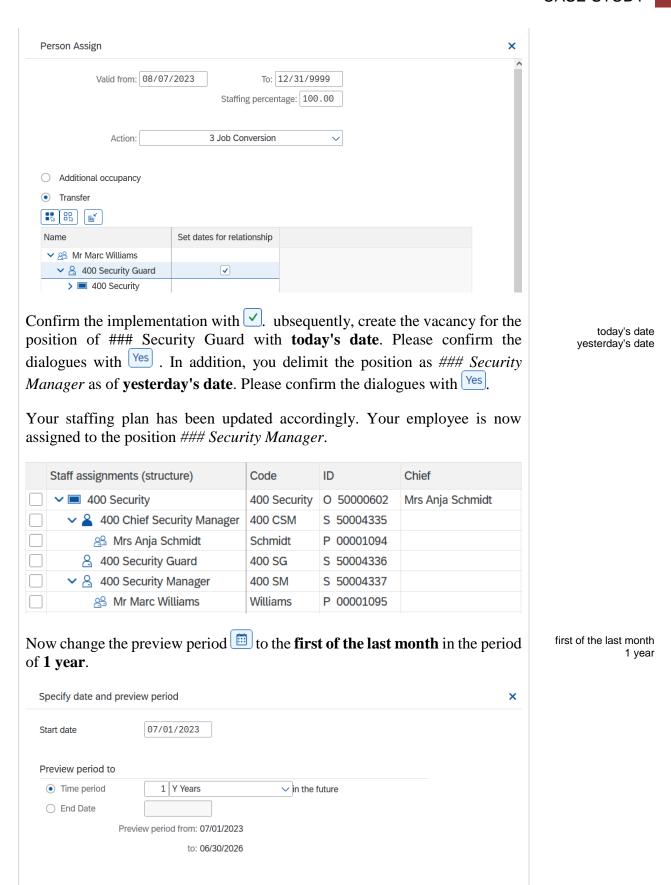
	Staff assignments (structure)	Code	ID	Chief	Workf
<b>~</b>	✓ ■ 400 Security	400 Security	O 50000602	Mrs Anja Schmi	
	→       400 Chief Security Manager	400 CSM	S 50004335		
	😤 Mrs Anja Schmidt	Schmidt	P 00001094		
	400 Security Guard	400 SG	S 50004336		
	😤 Mr Marc Williams	Williams	P 00001095		
	400 Security Manager	400 SM	S 50004337		

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

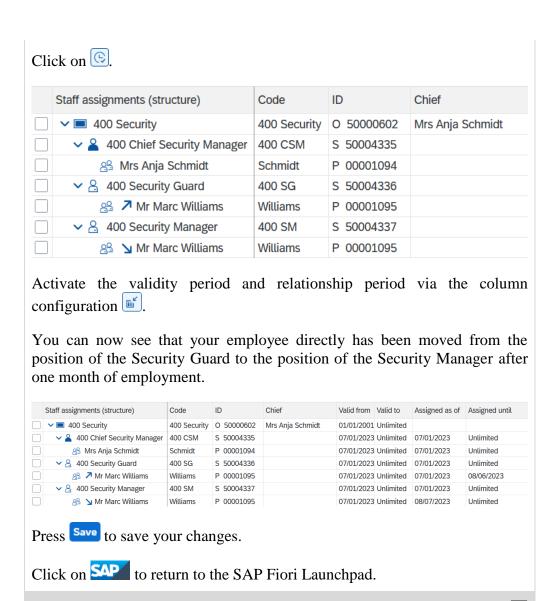
Please input **today's date** as the *Valid from* date and enter **100** as the *Staffing percentage*. Choose **Job Conversion** as the *action*. Select the position of the Security Guard to **set dates for relationship**. Compare your entries with the following screenshot.

today's date 100% Job Conversion

Set dates for relationship



(E) X



# 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 **1**<sup>st</sup> **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.

|--|--|