Human Capital Management (HCM)

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

Product

SAP S/4HANA 2022
Global Bike

Fiori 3.0

Level

Instructor

Focus

Human Capital Management

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Version

4.2

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MOTIVATION

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

The main objective of the Global Bike case studies in general is for students to understand the concept of integration. This descriptive and explanatory case study will allow students to understand the importance and the advantages of integrating enterprise areas using an S/4HANA system.

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

SAP University Alliances

Prerequisites

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

Technical Prerequisites

Basically, the case study is based on the system environment of a standard SAP S/4HANA client with the current Global Bike dataset. Before processing the case study on your own or with your students, the general setting should be checked.

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

Year-end closing

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

User management

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

In an SAP S/4HANA Global Bike client already exist 1000 user accounts from **LEARN-000** to **LEARN-999**. These users need to be unlocked. The initial password for each LEARN-### account is set to **tlestart**.

LEARN-000 to LEARN-999

tlestart

Transaction **ZUSR** was developed in the Global Bike client in order to mass maintain SAP user accounts. For a detailed description of this and SAP standard transactions for user management (**SU01** and **SU10**) please refer to the *lecturer notes "User Management"* (see: current Global Bike curriculum → chapter 99 – Instructor Tools).

ZUSR

SU01
SU10

All LEARN-### user accounts have been assigned to the role *Z_UCC_GBI_SCC* and have authorizations to use all applicative transactions in the SAP S/4HANA system. The role allows access to all transactions necessary for Global Bike exercises and case studies. If you need access to system-critical transactions, i.e. for development purposes, you may assign the composite profile *SAP_ALL* to your student accounts.

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

Instructor account
LEARN-000

Didactic Prerequisites

In order to successfully process this case study, students should be familiar with the **navigation** in SAP systems, especially the SAP Fiori Launchpad as well as possible documentation and help options. We highly recommend using the *navigation slides* and the *navigation course* (see: current Global Bike curriculum → chapter 2 – Navigation).

Navigation

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

Historic background

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

In order to function properly this case study needs a **Global Bike client version** that is equal to or higher than the case study version (see cover page). Please check. If you do not know the client version please use the transaction **ZGBIVERSION** within your SAP S/4HANA system or contact your UCC team.

Global Bike client version

Global Feedback

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

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

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Student Assessment

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

Global Bike Monitoring Tool (beta)

We are developing a GB Monitoring Tool, which is available in this GB release. Since it is still in development the beta version does not support all case studies yet.

A detailed tutorial for this tool is available in the module 99 Instructor Tools of the current GB curriculum. Please keep in mind that this app is an additional functionality designed by the UCC Magdeburg and still in development. Therefore, we kindly ask you to send any feedback or detailed error descriptions to the following address: **gbi@ucc.ovgu.de**

☐

Learning Snacks HCM

Note With the Learning Snacks HCM you can check your learning success in the module HCM.

What is Learning Snacks ?

Learning Snacks offers the possibility to check the knowledge gained during the case studies and exercises by means of small single-choice questions. Depending on the selected module, you can play through a Learning Snacks (HCM here). Learning Snacks can be used with or without prior registration. By having your own account, you can create snacks yourself, like other snacks and receive some kind of points for each question you answer correctly.

You can find detailed instructions on Learning Snacks in the module "98 Cross-Module".

♡ 17   👁 862

HCM English

Success monitoring: Check Organization and Staffing

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

Organization and Staffing Display

Use the app **Display Organizational Plan** in order to display organization and staffing.
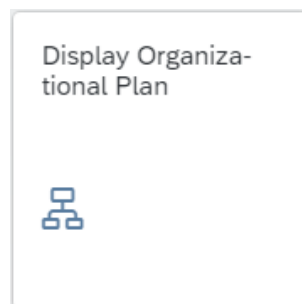
Fiori App

Display Organiza-
tional Plan

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

Administration

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

Administration

Hit list

Existence	Name
	Administration and Financials
	Administration
	Administration and Financials
	Administration

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

Highlight Administration

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

Problem: Filling the wrong Position

Problem One participant accidentally filled the wrong position.

Cause Inattention while choosing the position

Solution Correct the mistake

Organization and Staffing Change

Use the app **Create Positions** in order to change organization and staffing.

	Fiori App

Create Positions

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

Administration

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

Administration

Hit list

Existence	Name
	Administration and Financials
	Administration
	Administration and Financials
	Administration

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

Highlight Administration

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

Problem: Booking of the wrong Event

Problem One participant accidentally booked the wrong event.

Cause Inattention while choosing the event

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

Dynamic Attendance Menu

Use the app **Book the event** in order to select the dynamic attendance menu.

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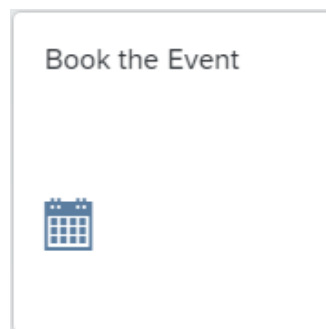
In the *Dynamic Attendance Menu*, use the following path:

GB Training and Education ▶ Security Training ▶ GB Security Training

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

Highlight the objectionable participant and use the following menu path **More → Attendance → Rebook Attendance.**

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

Normal Booking

Execute Rebooking.

Dynamic Business Event Menu (optional)

Use the app **Create event** in order to select the dynamic business event menu.

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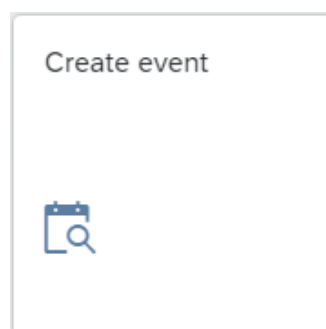
Note In case two participants switched the booking of their business events, you should increase the capacity of one of those events before rebooking.

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

GB Training and Education ► Security Training ► GB Security Training

Now you can see a list of all business events. Choose one of the accidentally switched events and use the menu path **More → Business Event → Dates → Change.**

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

Save **Save** your entries.

▊ Problem: Unable to follow up the Business Event

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

Cause The business event was not firmly booked.

Solution Book the business event firmly.

Firmly Book/Cancel Business Event

Use the app **Follow up the event** to book a business event firmly.

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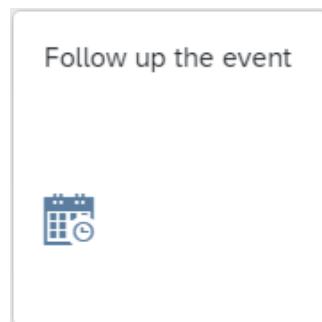
In the *Dynamic Business Event Menu*, please use the following path:

GB Training and Education ► Security Training ► GB Security Training

Now you can see a list of all business events. Select the affected event and go to the menu path **More → Business Event → Firmly Book / Cancel.**

Your business event should now be entered in the *Business event* field in the *Firmly Book / Cancel Business Event* screen. Select **Firmly book (maximum).** Then click [⤷ Data Screen].

In the *Firmly Book Business Event: Display Attendee List* screen click on [Without Rebooking] to save your business event without rebooking..

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

☐

Solution: HCM Challenge

Learning Objective Understand and perform an integrated recruitment process.

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 affinity. 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.

Create Organizational Unit

In the course of the app **Create Positions**, please create a new organizational unit as subordinated organizational unit of the security department.

Fiori App

Create Positions
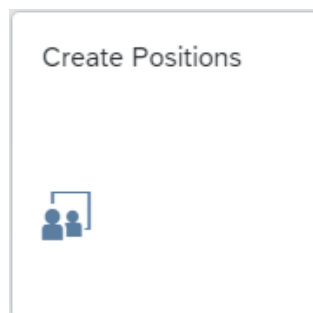
Please click on the *preview period - symbol* 📅 and enter the **first day in six months** as the start date. In addition, select a preview period of one year in the future and confirm the entry.

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

A new organizational unit has now been created in your ### Security Department.

In the lower part of your screen, you can now see the detailed data for the new position. Please enter the identifiers for the Organizational Unit **### PS** and as General Description **### Plant Security**.

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

Please highlight your organizational unit ### Security and click 🗋. In the opening screen *Choose Relationship* please select **Incorporates**.

A new position has now been created in your ### Security Department. In the lower part of your screen, you can now see the detailed data for the new position. Please enter the identifiers for the Position **### CoS** and as General Description **### Chief of Security**. Subsequently, activate the checkbox **Head of own organizational unit**. Click **Save** and 🔄.

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

Now create the positions **### Senior IT Admin** (**### SITA**) and **### Junior IT Admin** (**### JITA**) for the department ### IT Security (make sure that the ### *Senior IT Admin* is head of own organizational unit).
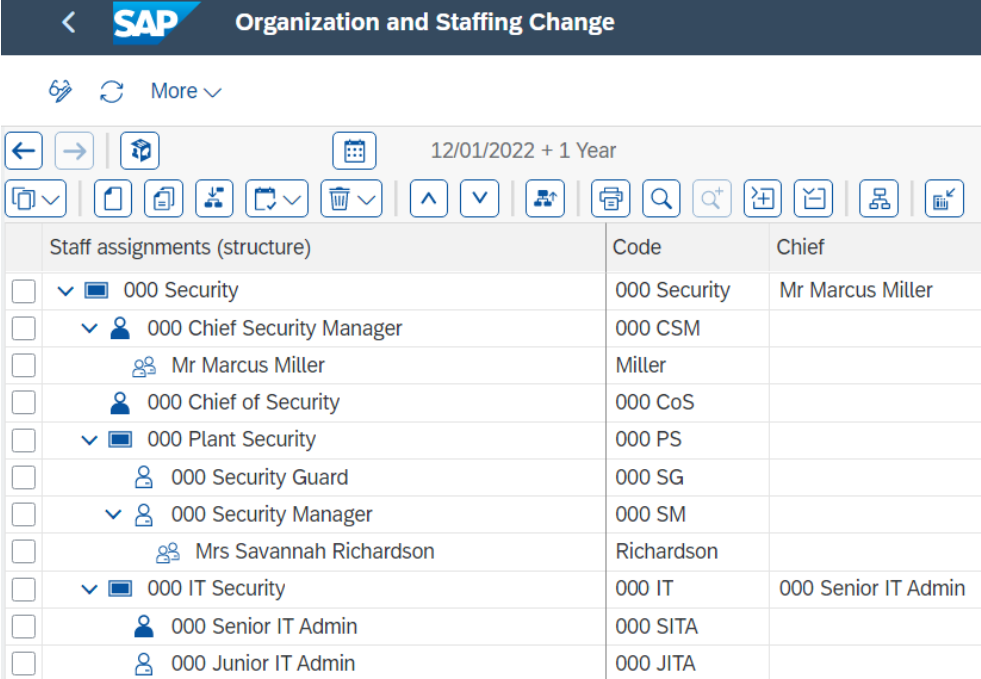
Both positions should be valid from the **first day of the current month**. Click **Save** and ⟳.

Click on **SAP** to return to the SAP Fiori Launchpad.

Create Qualification

In the course of the app **Catalog: Change Qualification**, you can extend the qualification catalog.
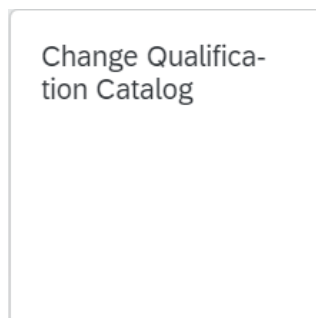
Note If the app is not displayed, search for it by using the search bar 🔍.

In the screen *Catalog: Change Qualification(s)* use ⎀ to create a new qualification group ### **Soft Skills** with a matching scale (e.g. 5 Points Scale (1-3)).

Within this new qualification group, please create the qualification ### IT Affinity.

To do this, select the group 000 Soft Skills and then choose 🗋. In the upcoming dialog, select Qualification and press Enter.

In the following screen *Create Qualification* you can create the group **### IT Affinity**.

Create Qualification

Qualification | Proficiencies | Addit. Data

000 IT Affinity

Valid from: 01/01/1900   to: 12/31/9999

Description

Qualification group | 000 Soft Skills

Scale: | Points Scale (1-3)

Save ✕ ✓

Your qualifications catalog should now look like this:

Catalog: Change Qualification(s)

Position | Segment | Services for Object | More

Catalog   01/01/1900 - 12/31/9999   01 Current plan

☐ 000 Soft Skills

☐ 000 IT Affinität

☐ Certification
☐ Communication
☐ Education
☐ Technology

Click on **SAP** to return to the SAP Fiori Launchpad.
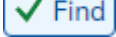
Determine Requirement

In the course of the app **Define Requirements**, please determine the requirements for your new positions.

In the screen *Find by* please choose **Position → Search term** In the opening window, to find your positions, please enter **###*** into the field *With name*.

Subsequently, press .

In the lower part of your screen, the results are displayed in the *Hit list*. Now choose your newly created position (**### Chief of Security**) and double-click on it.

An empty list of requirements is displayed in the right part of the screen. Click to define new requirements for your position.

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

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

Yes

Essential

1st in six months

Please click Save to save your changes.

Please follow the same pattern to define the Essential Requirements **IT Affinity** (to very good) and **Bachelor's Degree** for your **### Senior IT**

LECTURER NOTES

Admin. Please remember that the **### Junior IT Admin** is also supposed to have **IT Affinity** as Essential Requirement. Save your changes.

		Position: Change Profile (06/20/2022 - 12/31/9999)				

Succession Planning   Current Holder   Services for Object ⌄   More ⌄

← →   📅 06/20/2022   to: 12/31/9999

Position: 000 Senior IT Admin
Start: 12/01/2022 - 12/31/9999
Holder:
Org. unit:

Requirements

	Qualification group	Name	Status	Proficiency	Ess	Start	End Date	⚙
☐	Education	Bachelor's Degree			☑	12/01/2022	12/31/9999	
☐	000 Soft Skills	000 IT Affinity		Very Good	☑	12/01/2022	12/31/9999	

Please click **Save** to save your changes.

Click on **SAP** to return to the SAP Fiori Launchpad.

Hire Employees

In the course of the app **Hire Employee**, you can hire new employees.

Fiori App
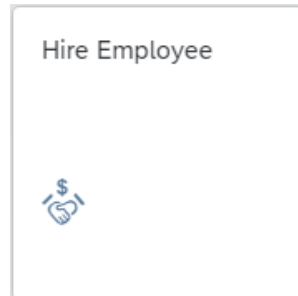
Hire Employee

Hire new employees for the positions of the ### Security Guard in the department ### Plant Security, and for the positions ### Senior IT Admin and ### Junior IT Admin in the ### IT Security.

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

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

You have now completed the personnel action, you can check your current organization and staffing in the app **Display Organizational Plan**.
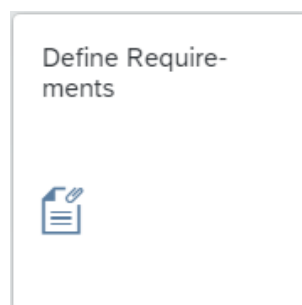
Click on to return to the SAP Fiori Launchpad.

Change Qualification Profile

In the course of the app **Define Requirements**, you can change the Qualification Profile of your employees.

Fiori App

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

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

Last Name

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

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

Extend Education and choose **Masters**. Please confirm your changes by clicking [icon]. Change the Start Date to the **first in six months** and choose a **grade of your own choice** as Proficiency.

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

Save your changes by clicking **Save** .

Click on **SAP** to return to the SAP Fiori Launchpad.

Transfer Employee

In the course of the app **Change Organization and Staffing**, you can transfer your employees.

Change Organiza-
tion and Staffing

Fiori App

Note If the app is not displayed, search for it by using the search bar 🔍.

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

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

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

1st in six months
100%
Job
Conversion

Select Link terminate

Please create a vacancy for the position of the Chief Security Manager valid from today's date. Furthermore, please delimit the vacancy of the position of the Chief of Security on the first day in six months. Click [Yes] to confirm the dialogue.

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

Since the Chief Security Manager's job is no longer needed, you can delete the assignment. Choose [🗑 ⌄].

Save the profile by clicking on **Save**.

Click on **SAP** to return to the SAP Fiori Launchpad.