

# **SAP BASIC TRAINING - PERSONNEL ADMINISTRATION**

SAP Training Manual for end users

May 2014

|                                |             |                                |              |    |
|--------------------------------|-------------|--------------------------------|--------------|----|
| Prepared by:<br>Alicia Aguirre | Revised by: | Approved by:<br>Rafael Jiménez | Document ID: |    |
| Date: 12/05/2014               |             | Date: 14/05/2014               | Version:     | 01 |
|                                |             |                                | Revision:    | 00 |

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|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
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## 1. Change control

| Version | Description<br>[or description of changes] | Author | Creation date |
|---------|--|--------|---------------|
| v01     | Creation                                   | HR     | 17-03-2014    |

|                                |             |                                |              |    |
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|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
|   | ID   |  |  |  | Version          | 01 | Revision | 00 |


## 2. Distribution list

| Name      | Position | BU   |
|-----------|----------|--|
| End users | HR       | Benelux, Central<br>Europe, Italy, America |
|           |          |  |
|           |          |  |
|           |          |  |
|           |          |  |

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:6   |    |
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### 3. Introduction

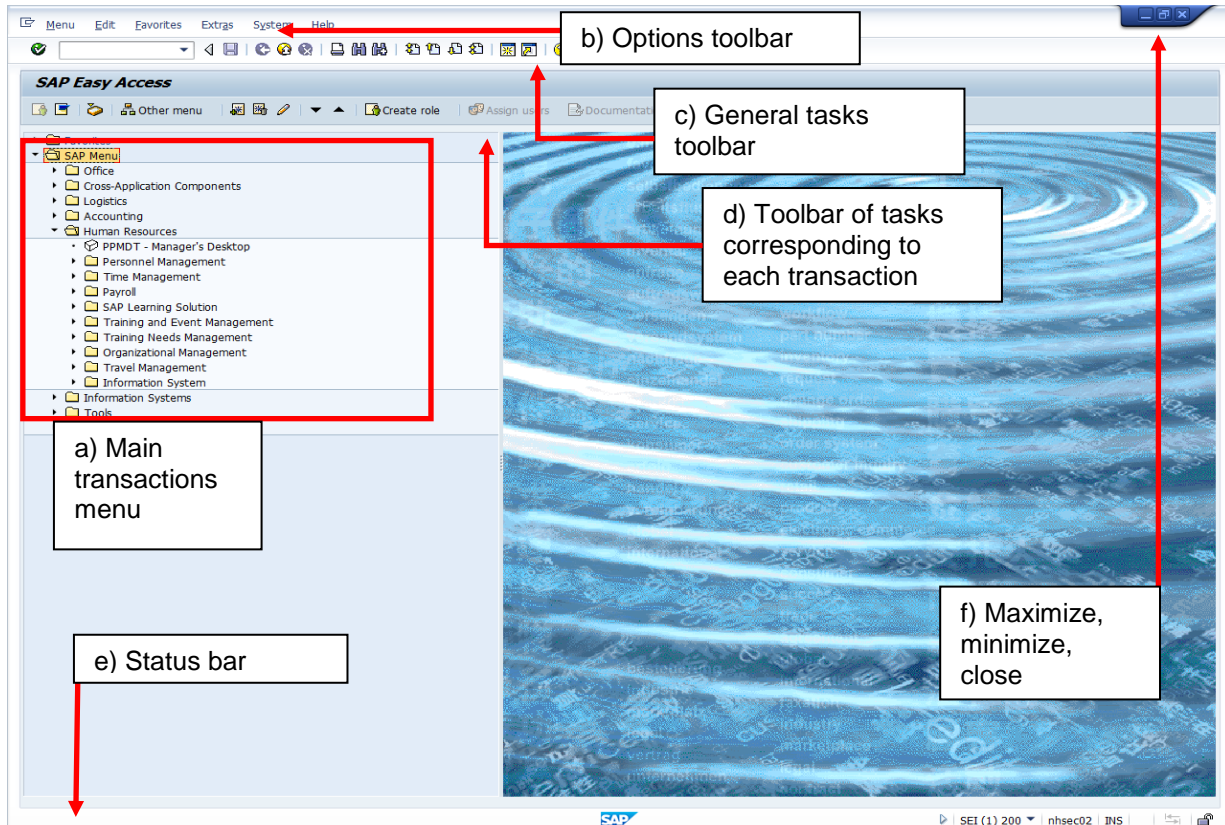
The objective of this manual is to introduce the user to the new computer system of personnel management, as well as to provide support and serve as a graphic and explanation guide for daily operations; in order to ensure the correct personnel management in the application and the quality of the data reported in the new system.

|   |  |  |                  |    |          |    |
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## 4. Basic Concepts

### 4.1. Access to the system.


To access the system, the user should click on the SAP Logon icon . Once the registration screen is opened, log in with your username and password to access the main menu.



- a) Main transactions menu. Allows to navigate between different functionalities that each user has access to.
- b) Options toolbar. Allows to create shortcuts to access specific transactions, and to configure system options.
- c) General tasks toolbar. Contains icons for quick access to the most frequent actions, and allows to enter the key of the transaction to be executed.




- d) Toolbar of tasks corresponding to each transaction. Indicates the possible tasks to execute for each transaction.

















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- e) Status bar. Indicates the progress of the task execution and the possible errors.
- f) Maximize, minimize, close. As in any application, the upper right corner allows us to maximize, minimize or close the tab.


#### 4.2. Basic icons.

|   |                          |  |                                  |
|---|--------------------------|--|----------------------------------|
|    | Continue                 |       | First page / Previous page       |
|    | New document             |       | Delete                           |
|    | Execute                  |       | Next page / Last page            |
|   | Save                     |      | Create new mode/window           |
|  | Back                     | F1  | Help                             |
|  | Finish                   |     | Set local device                 |
|  | Cancel                   |     | Ascending / Descending ranking   |
|  | Print                    |     | Insert / delete line             |
|  | Search / Continue search |     | Local file                       |
|  | Chart view               |     | Bring variant                    |
|  | E-mail recipient         |     | Multiple / Alternative selection |
|  | Set filters              |     | Position                         |

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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|   |                           |   |  |
|---|---------------------------|---|--|
|    | Copy                      |    | Select list value                              |
|    | Select all / Unselect all |    | Multiple selection / Other assignment criteria |
|    | Another document          |    | Detail   |
|    | Edit text                 |    | Expand / Collapse                              |
|    | Display text              |    | Create role                                    |
|    | SAP Menu                  |    | SAP Business Workplace                         |
|  | Display / Edit            |  | Add / Delete favorites                         |
|  | Edit                      |  | Up / Down favorites                            |

**Note.** Holding the mouse over each icon, it indicates the task to which it corresponds.




In the transaction screens, the system will request different information fields, among which all those marked with ☒ correspond to mandatory values; and the ones marked with  allow to select a value from a predefined list.




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|
|--|

#### 4.3. Notifications.


In the status bar, SAP communicates the status of tasks to be executed, with the following messages:

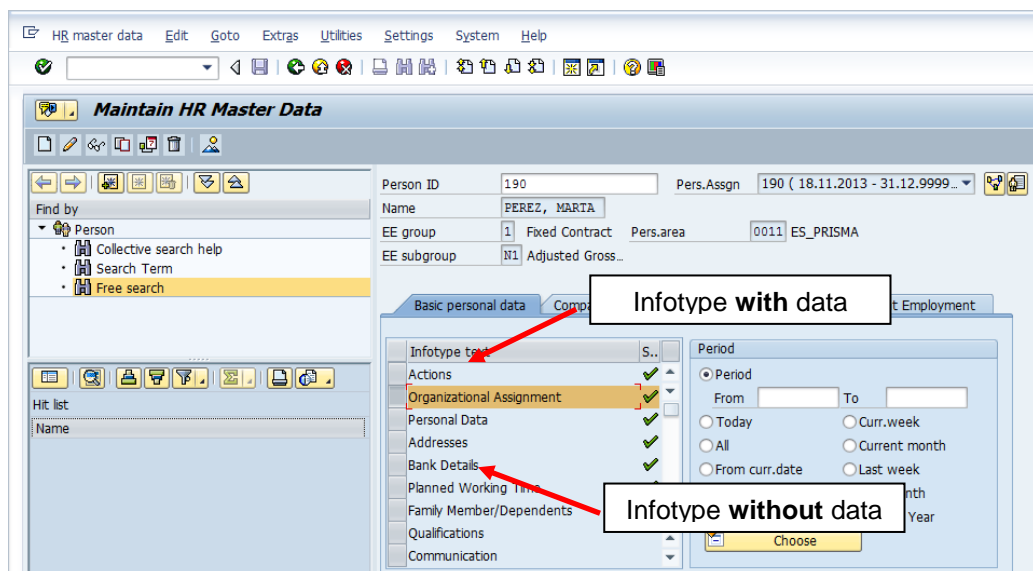
-  **Information:** Indicates that the task has been successfully completed.
-  **Warning:** Indicates that the task will be executed, however informs of possible states or consequences. The task is executed by pressing ENTER.
-  **Error:** The system reports that the task can not be executed until error is corrected.

|   |  |  |  |  |                  |    |          |    |
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## 5. SAP functionality

SAP works with different transactions depending on the task you want to perform: display, execute or modify data. The most common tasks are listed for the daily operational personnel management, as well as other features of the application:


- **PA40:** this transaction allows to perform actions applied to the employee.
- **PA20:** through this transaction we may view the employee data.
- **PA30:** this transaction allows us to modify the employee data.
- **Infotypes:** In SAP, the data related to an employee is stored in infotypes. An infotype represents a group of homogeneous data of an employee and is characterized by being limited in time. Infotypes have names and a 4-digit code. The infotypes that have the mark  on their right, are updated for the selected employee.

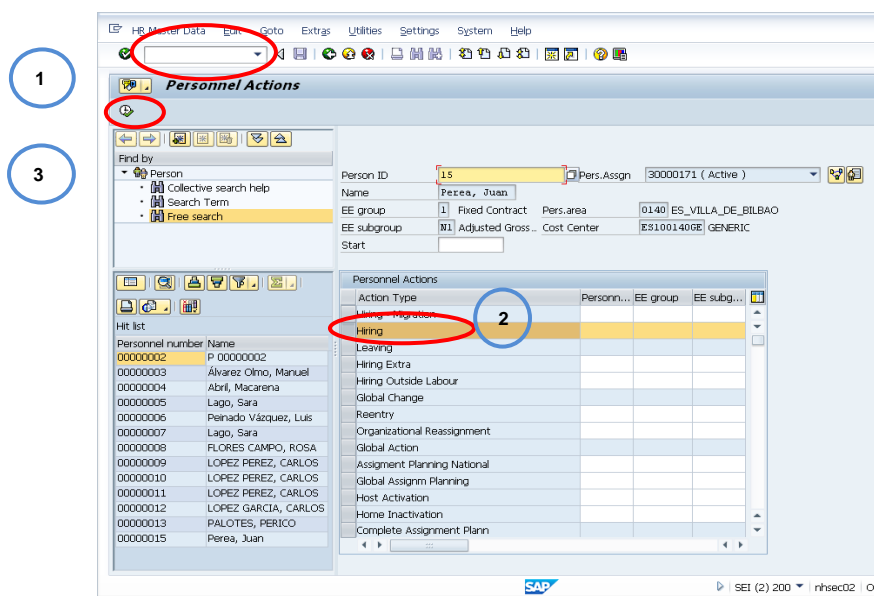


- **General search:** We are going to use the \* symbol, to indicate that the search should contain the introduced values.

|   |  |  |                  |    |          |    |
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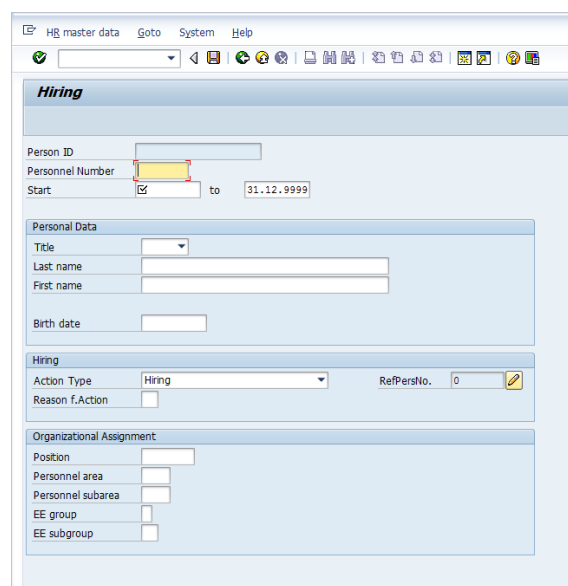
## 6. Employee hiring

To process employee hiring, other than extra or outside labour, we enter the PA40 transaction, select the action HIRING and click on the execute icon .




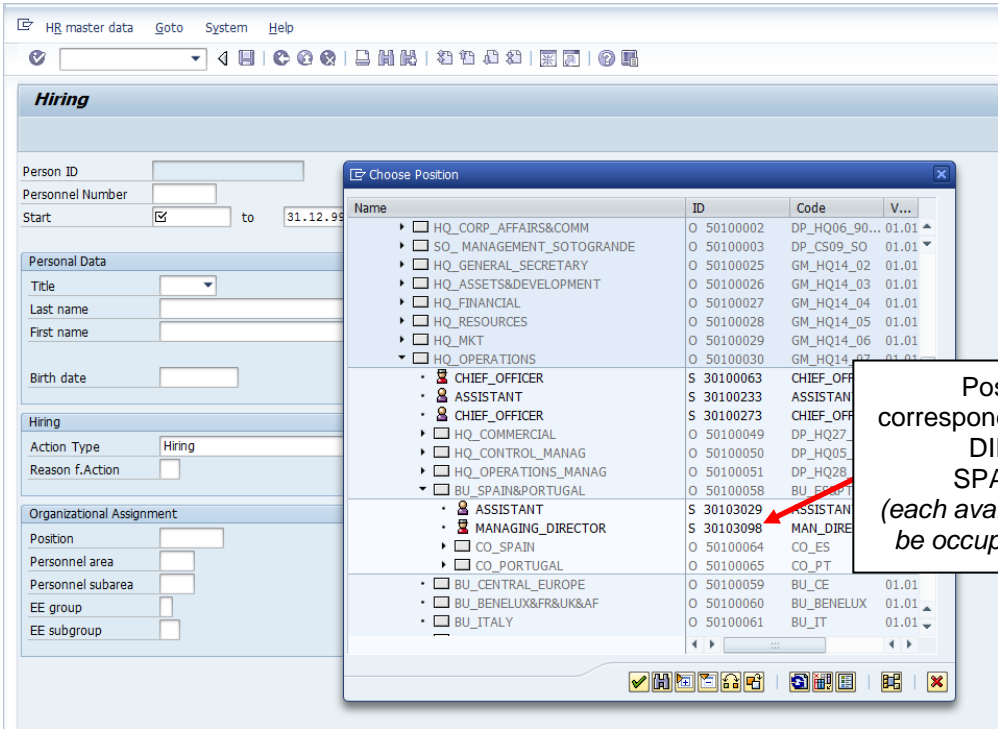
We will see the HIRING window where we should fill in the following fields:

- Start (employee's start date)
- Title (treatment of the person)
- Last name
- First name
- Birth date
- Position (position of the employee in the organizational structure). Clicking on this field, a window with the organizational structure will be displayed. Clicking on different "boxes", the hierarchically lower ones will deploy, so we may see the different departments until finding the desired position.
- Personnel Area (work center)
- Personnel Subarea (department)
- EE group (employee type)
- EE subgroup (employee with agreed wage or convention)




The Personnel number field should not be filled in, as the system will generate it automatically when saving.

|   |   |                  |          |          |    |
|---|---|------------------|----------|----------|----|
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|   | Title: <b>Personnel Administration</b>            |                  |          |          |    |
| ID  |   | Version          | 01       | Revision | 00 |



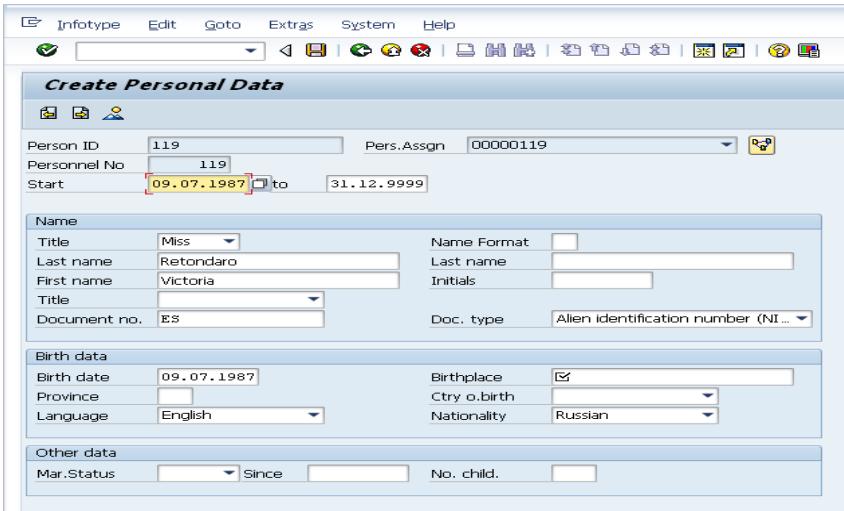
**Position 30103098, corresponding to the MANAGING DIRECTOR of BU SPAIN&PORTUGAL (each available position may only be occupied by one employee)**


Once all the data is filled in, we click on the icon  to save the information and continue to the next screen.

In the infotype **0002 CREATE PERSONAL DATA** the previously reported fields are displayed filled in; since the employee's last name was not previously requested, the second field *Last name* does not appear filled in.

In this infotype at least the mandatory fields should be reported: document type, document number, birthplace and nationality.

The date displayed in the start field is the employee's date of birth.

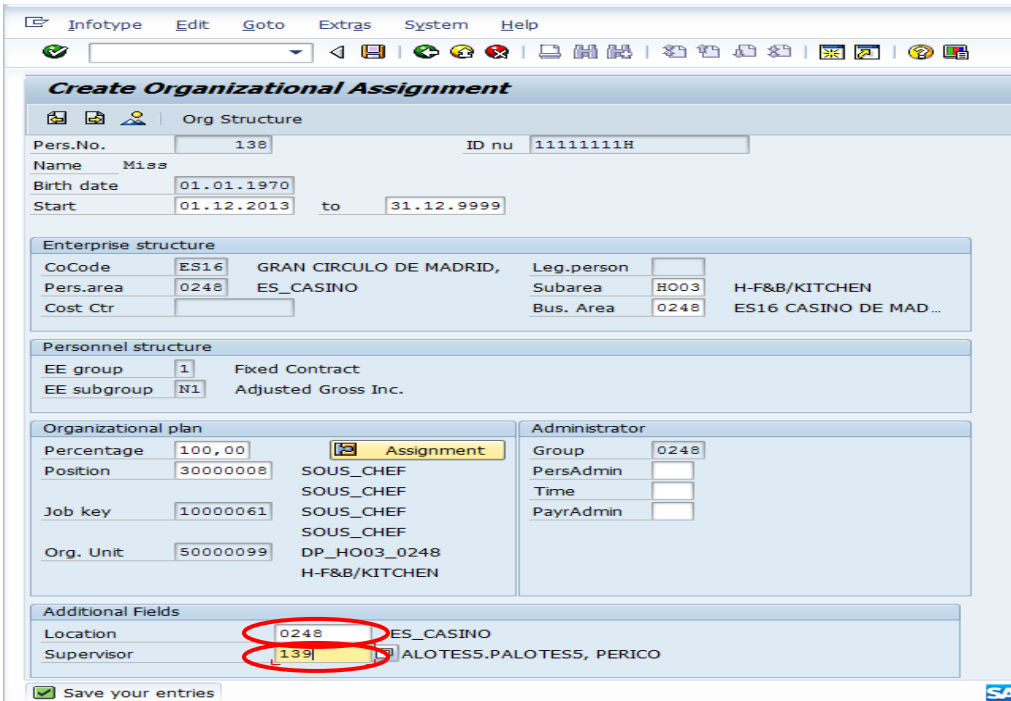


|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:14  |    |
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|   | ID   |  |  |  | Version          | 01 | Revision | 00 |

After saving the reported data, the following screen will be displayed, corresponding to the **infotype 0001 CREATE ORGANIZATIONAL ASSIGNMENT**, that shows the previously reported organizational data.

In this infotype the field *Location* (physical location of the employee) should be reported; clicking on this field, the list of values that can be selected will be displayed. In this infotype the field *Supervisor* should also be reported, when deploying the responsible person will be displayed, and clicking on Enter, the field with the employee number will be filled in, displaying the Last name and the First name.


The percentage displayed is related to the position and by default is 100%; this field is not related to the employee's working day.

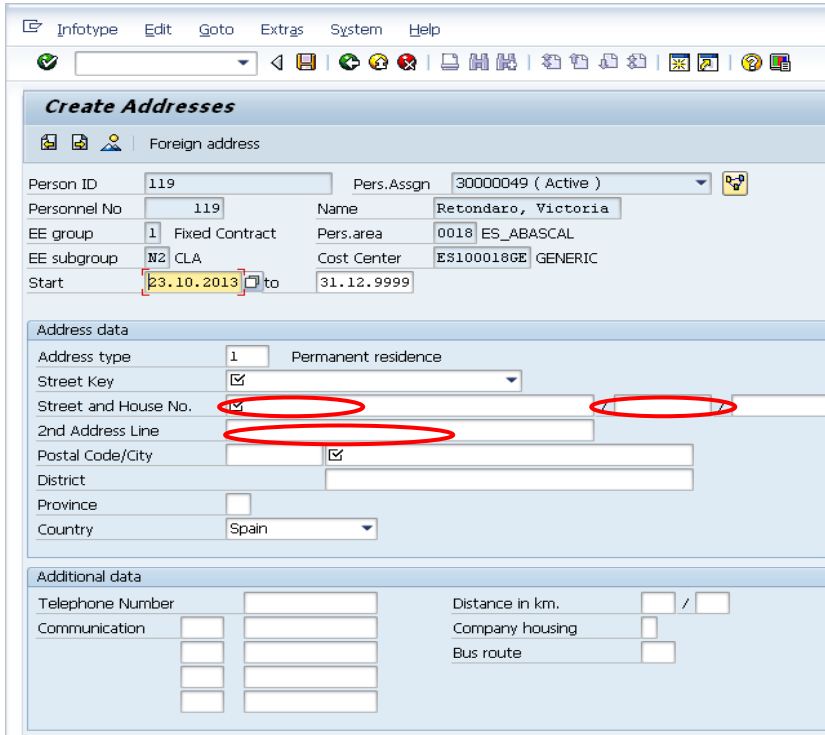


Once saved, you pass to the next screen corresponding to **infotype 0006 CREATE ADDRESSES**, where we should fill in the required fields.

The address format to be taken into account to complete the open fields is:

- In the *first* field *Street and House No.* the name of the street should be reported
- In the *second* field *Street and House No.* the number of the street should be reported
- In the field *2nd Address Line* the floor, letter, stairs,... should be reported

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:15  |    |
|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
|   | ID   |  |  |  | Version          | 01 | Revision | 00 |




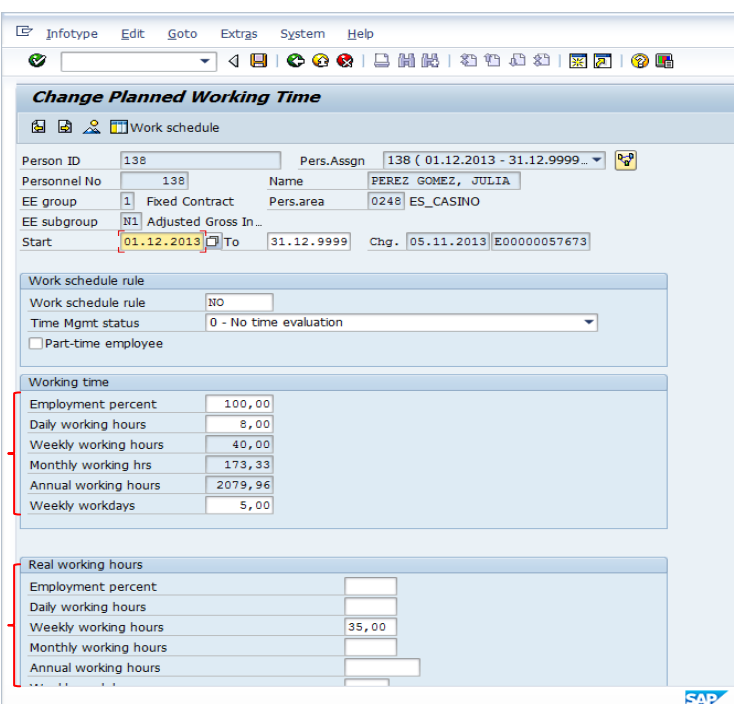
After saving the data, the **infotype 0007** of **CREATE PLANNED WORKING TIME** will be displayed, to fill in the data of the employee's working day.

By default the field *Time Mgmt status* is filled in with the value "0- No time evaluation", that should be maintained.

The fields corresponding to the section *Working time*, report the 100% of the employee's working day; by default the field *Employment percent* is filled in; clicking Enter will fill in the rest of the fields of this section, with general values defined for the 100% working day.

The fields of the section *Real working hour* should be always filled in, not only in case the employee has a reduced working day (either by legal conditions, or by partial contract), to report the working day that the employee actually has, filling in the field that proceed.

|   |  |  |  |  |                  |         |         |          |
|---|--|--|--|--|------------------|---------|---------|----------|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |         | Page:16 |          |
|   | Title: Personnel Administration            |  |  |  |                  |         |         |          |
|   | ID   |  |  |  |                  | Version | 01      | Revision |



**100% working day**

**Real working hours**

**Change Planned Working Time**

Work schedule

Person ID: 138 Pers.Assgn: 138 ( 01.12.2013 - 31.12.9999...)

Personnel No: 138 Name: PEREZ GOMEZ, JULIA

EE group: 1 Fixed Contract Pers.area: 0248 ES\_CASINO

EE subgroup: N1 Adjusted Gross In...

Start: 01.12.2013 To: 31.12.9999 Chg.: 05.11.2013 E00000057673

Work schedule rule

Work schedule rule: NO

Time Mgmt status: 0 - No time evaluation

☐ Part-time employee

Working time

|                      |         |
|----------------------|---------|
| Employment percent   | 100,00  |
| Daily working hours  | 8,00    |
| Weekly working hours | 40,00   |
| Monthly working hrs  | 173,33  |
| Annual working hours | 2079,96 |
| Weekly workdays      | 5,00    |

Real working hours

|                       |       |
|-----------------------|-------|
| Employment percent    |       |
| Daily working hours   |       |
| Weekly working hours  | 35,00 |
| Monthly working hours |       |
| Annual working hours  |       |

Once the data is saved, the **infotype 0008 CREATE BASIC PAY** will be displayed.


The mandatory fields in this infotype are: PS Type, PS Area and PS Group and Level, that will be filled in with general NH values, except the PS Area, which will be the corresponding collective agreement.

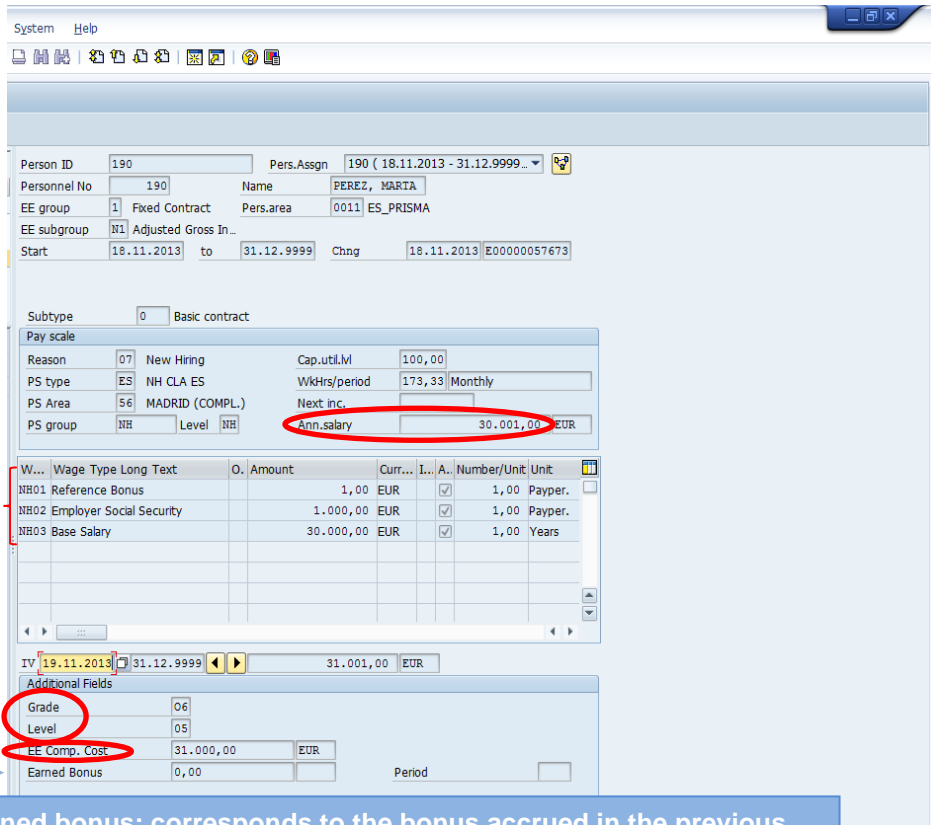
In the field Wage Type Long Text, the salary concepts of Reference Bonus, Employer Social Security, Base Salary should be reported, indicating the amount of each concept in the field *amount*, taking into consideration the 100% of the working day. The number of pays will be reported in the field *number/unit*. In the field *unit* the value with the corresponding units (months, years,...) will be reported.

All the fields are mandatory, so in case there is no reference bonus, the value of 0,01€ should be reported in the field amount.

Finally, the fields *Grade* and *Level* should be reported, according to the grades policy of the Company.

Once all the salary concepts are reported, the field *Ann Salary* will be calculated automatically, showing the sum of base salary and reference bonus. The field *EE Comp Cost* will be also calculated automatically, summing the base salary, employer social security and earned bonus.

|   |  |  |                  |    |          |    |
|---|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  | Date: 14/05/2014 |    | Page:17  |    |
|   | Title: Personnel Administration            |  |                  |    |          |    |
|   | ID   |  | Version          | 01 | Revision | 00 |



Person ID: 190 Pers. Assgn: 190 ( 18.11.2013 - 31.12.9999... )

Personnel No: 190 Name: PEREZ, MARIA

EE group: 1 Fixed Contract Pers.area: 0011 ES\_PRISMA

EE subgroup: N1 Adjusted Gross In...

Start: 18.11.2013 to 31.12.9999 Chng: 18.11.2013 E00000057673

Subtype: 0 Basic contract

Pay scale

Reason: 07 New Hiring Cap.util.M: 100,00

PS type: ES NH CLA ES WkHrs/period: 173,33 Monthly

PS Area: 56 MADRID (COMPL.) Next inc.

PS group: NH Level: NH Ann.salary: 30.001,00 EUR

| W... | Wage Type                | Long Text | O. Amount | Curr... | I... | A... | Number/Unit | Unit    |
|------|--------------------------|-----------|-----------|---------|------|------|-------------|---------|
| NH01 | Reference Bonus          |           | 1,00      | EUR     |      | ✓    | 1,00        | Payper. |
| NH02 | Employer Social Security |           | 1.000,00  | EUR     |      | ✓    | 1,00        | Payper. |
| NH03 | Base Salary              |           | 30.000,00 | EUR     |      | ✓    | 1,00        | Years   |

IV: 19.11.2013 to 31.12.9999 31.001,00 EUR

Additional Fields

Grade: 06

Level: 05

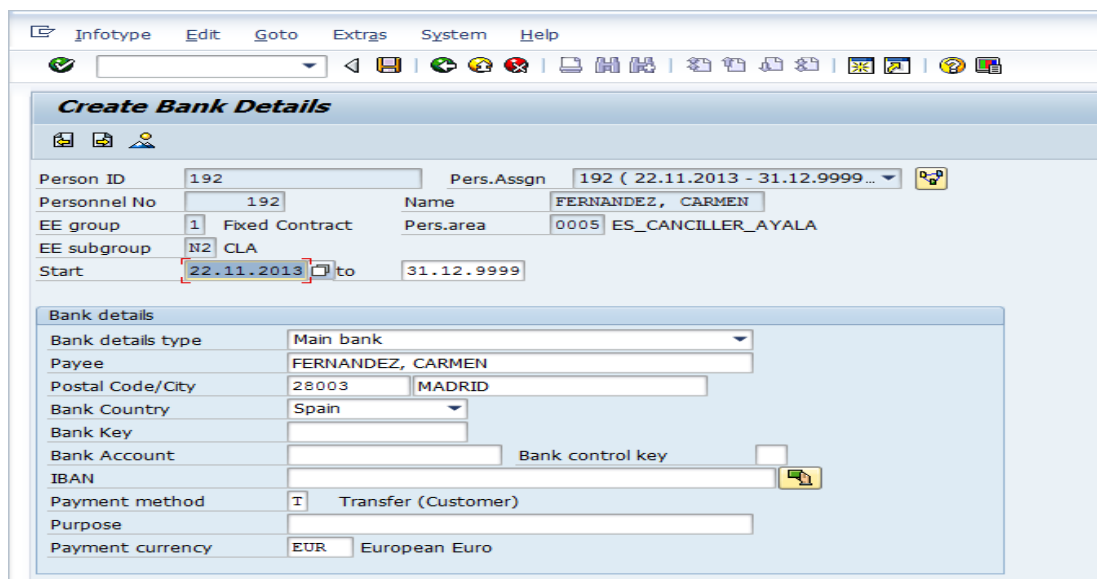
EE Comp. Cost: 31.000,00 EUR

Earned Bonus: 0,00

Earned bonus: corresponds to the bonus accrued in the previous year. It will be displayed once the employee's benefits are loaded.

Once we save the economic data, we will see the **infotype 0009 CREATE BANK DETAILS** where the method of payroll payment should be indicated in the field *Payment method*, being necessary to fill in the rest of the employee's bank details, in case the transference option has been selected.

The IBAN code will be generated automatically clicking on the icon 



Infotype Edit Goto Extras System Help

**Create Bank Details**

Person ID: 192 Pers. Assgn: 192 ( 22.11.2013 - 31.12.9999... )

Personnel No: 192 Name: FERNANDEZ, CARMEN

EE group: 1 Fixed Contract Pers.area: 0005 ES\_CANCELLER\_AYALA

EE subgroup: N2 CLA

Start: 22.11.2013 to 31.12.9999

Bank details

Bank details type: Main bank

Payee: FERNANDEZ, CARMEN

Postal Code/City: 28003 MADRID

Bank Country: Spain

Bank Key:

Bank Account:

Bank control key:


IBAN:

Payment method: T Transfer (Customer)

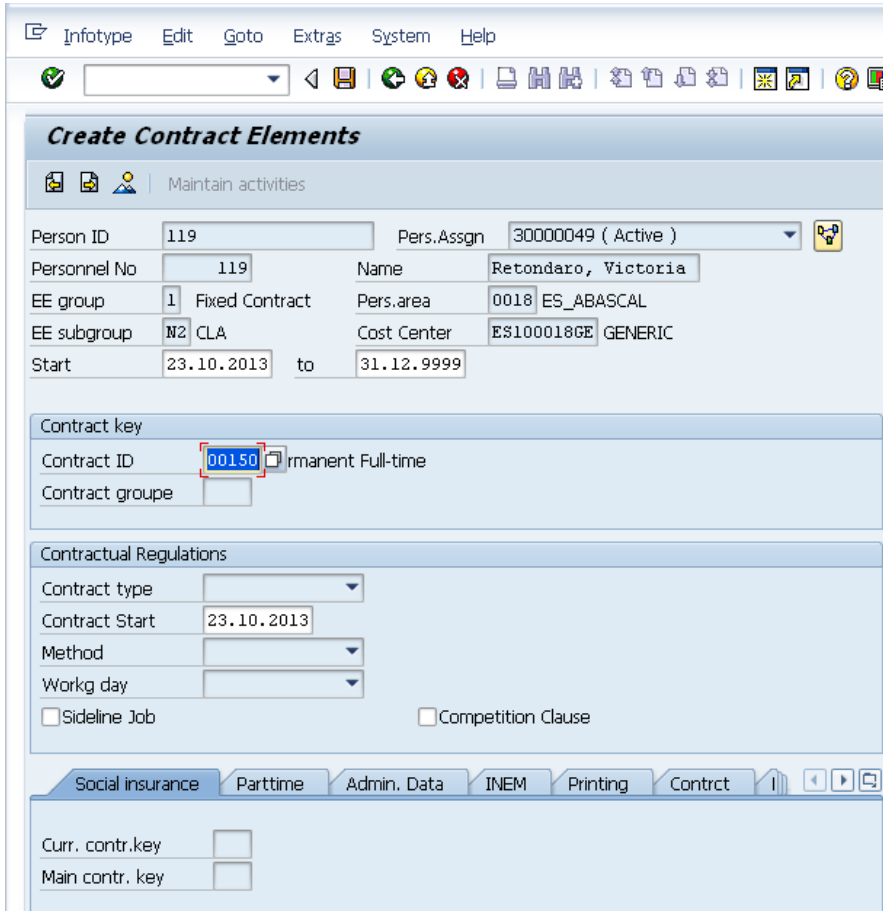
Purpose:

Payment currency: EUR European Euro




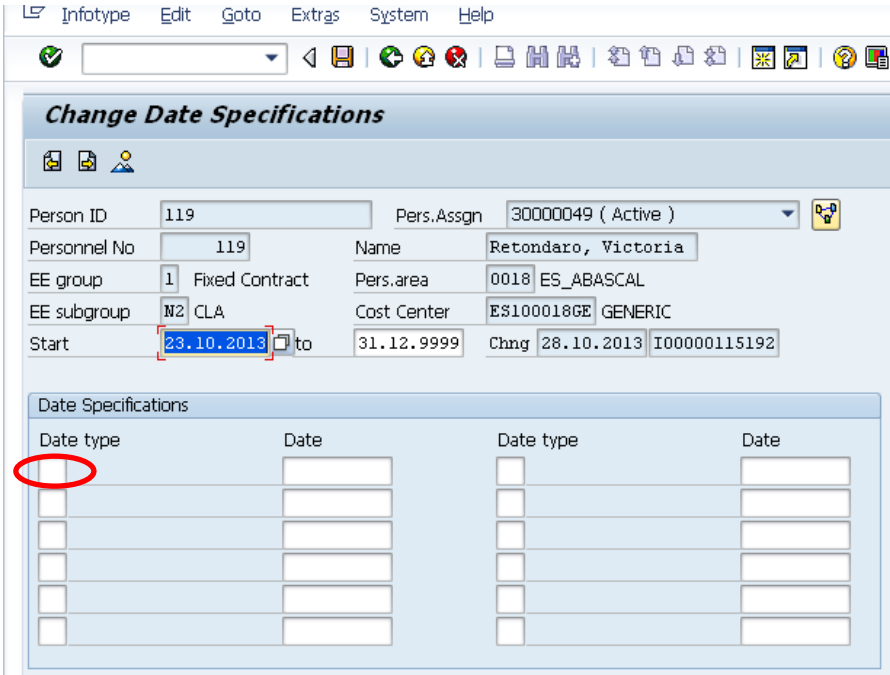
|  |  |  |  |  |                  |    |          |    |
|--|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:18  |    |
|  | Title: Personnel Administration            |  |  |  |                  |    |          |    |
|  | ID   |  |  |  | Version          | 01 | Revision | 00 |

When we save the information of this screen, the **infotype 0016 CREATE CONTRACT ELEMENTS** will be shown, where we should fill in the field *Contract ID*, with the employee's contract code.



The next screen that will be displayed is **CHANGE DATE SPECIFICATIONS**, (**infotype 0041**) where we may report the employee's seniority date, in case it is different to the one of the hiring we are processing.

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:19  |    |
|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
|   | ID   |  |  |  | Version          | 01 | Revision | 00 |



**Change Date Specifications**

Person ID: 119 Pers. Assign: 30000049 (Active)

Personnel No: 119 Name: Retondaro, Victoria

EE group: 1 Fixed Contract Pers. area: 0018 ES\_ABASCAL

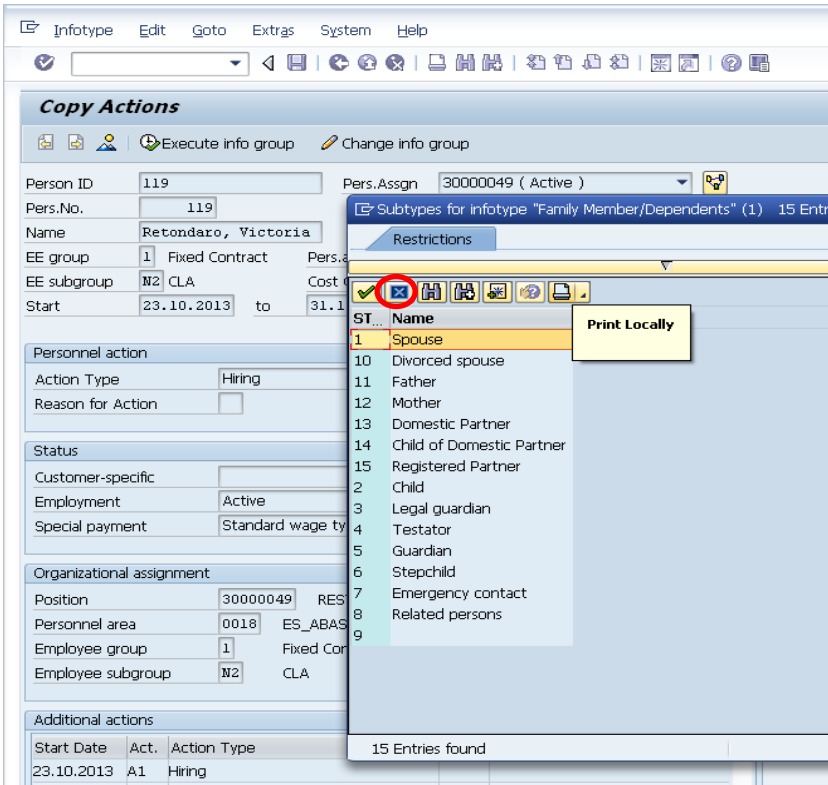
EE subgroup: N2 CLA Cost Center: ES100018GE GENERIC

Start: 23.10.2013 to 31.12.9999 Chng: 28.10.2013 I00000115192

| Date type | Date | Date type | Date |
|-----------|------|-----------|------|
|           |      |           |      |
|           |      |           |      |
|           |      |           |      |
|           |      |           |      |
|           |      |           |      |

To do so, in the field *date type* it is necessary to select the option first working date and fill in the real seniority date, in the field *date*.

The next infotype to be displayed will be **0021 FAMILY MEMBER/DEPENDENTS**. In case we don't want to fill in the relatives' data, we may click on the X of the screen displaying the different values, in order to finish the Hiring transaction.



**Copy Actions**

Person ID: 119 Pers. Assign: 30000049 (Active)

Pers. No.: 119 Name: Retondaro, Victoria

EE group: 1 Fixed Contract Pers. area: 0018 ES\_ABASCAL

EE subgroup: N2 CLA Cost Center: ES100018GE GENERIC

Start: 23.10.2013 to 31.12.9999 Chng: 28.10.2013 I00000115192

Personnel action: Hiring


Status: Active

Organizational assignment: Position 30000049, Personnel area 0018 ES\_ABASCAL, Employee group 1 Fixed Contract, Employee subgroup N2 CLA

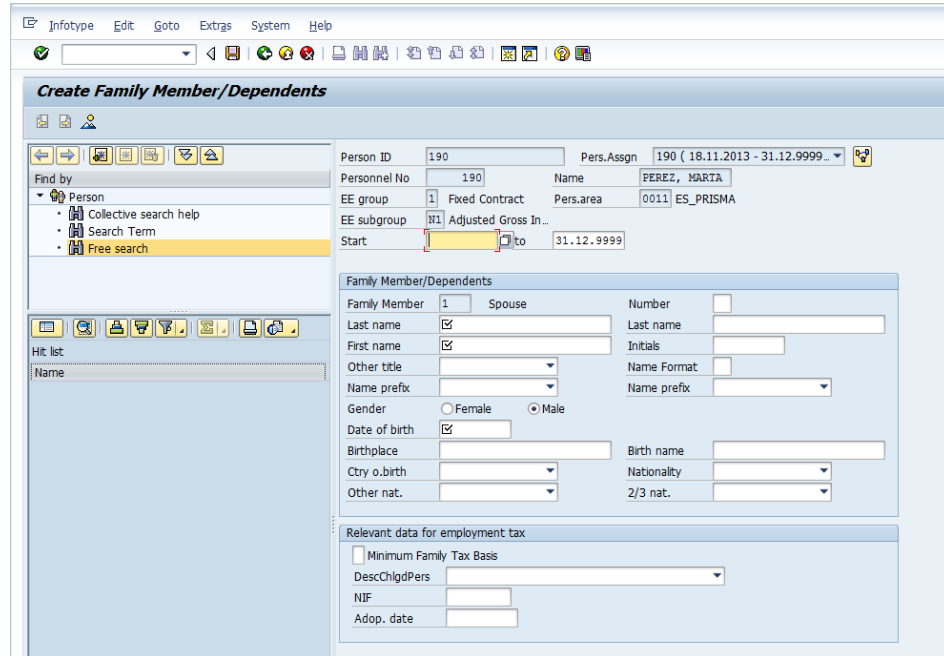
Additional actions: Start Date 23.10.2013, Act. A1, Action Type Hiring

Restrictions: 15 Entries found

- 1 Spouse
- 10 Divorced spouse
- 11 Father
- 12 Mother
- 13 Domestic Partner
- 14 Child of Domestic Partner
- 15 Registered Partner
- 2 Child
- 3 Legal guardian
- 4 Testator
- 5 Guardian
- 6 Stepchild
- 7 Emergency contact
- 8 Related persons
- 9

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:20  |    |
|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
|   | ID   |  |  |  | Version          | 01 | Revision | 00 |

When filling in this infotype, we should report at least the fields Last Name, First Name and Date of birth, corresponding to the spouse and/or children.



The screenshot shows the SAP 'Create Family Member/Dependents' infotype form. The form is titled 'Create Family Member/Dependents' and contains the following fields:

- Person ID: 190
- Pers.Assign: 190 ( 18.11.2013 - 31.12.9999..)
- Personnel No: 190
- Name: PEREZ, MARIA
- EE group: 1 Fixed Contract
- EE subgroup: N1 Adjusted Gross In...
- Pers.area: 0011 ES\_PRISMA
- Start: 18.11.2013
- to: 31.12.9999

The 'Family Member/Dependents' section includes the following fields:

- Family Member: 1
- Spouse: ☐
- Number:
- Last name:
- First name:
- Other title:
- Name prefix:
- Gender: ☐ Female ☒ Male
- Date of birth:
- Birthplace:
- Birth name:
- Ctry o.birth:
- Nationality:
- Other nat.:
- 2/3 nat.:

The 'Relevant data for employment tax' section includes the following fields:

- Minimum Family Tax Basis: ☐
- DescChgdPers:
- NIF:
- Adop. date:

|  |
|--|
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## 7. Internal changes


Through this action we may manage different changes of the employee (hours, contract, salary,.....)

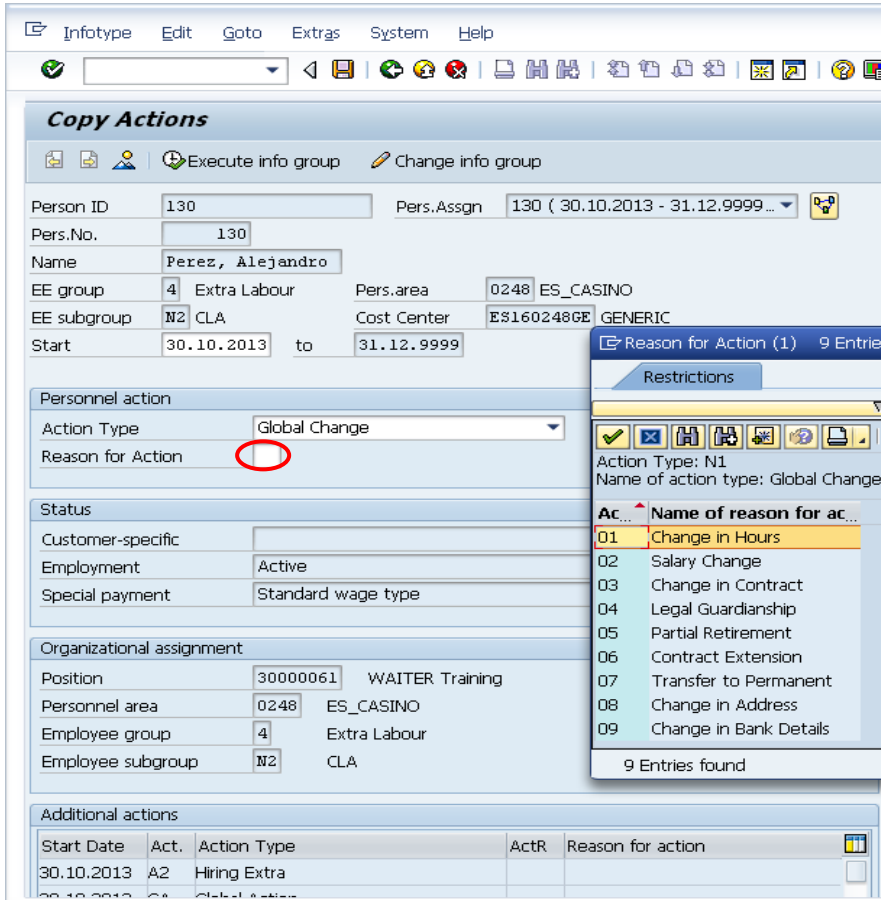
To do so, access the transaction PA40, select the employee, the action INTERNAL CHANGES and click on the execute icon.

On the first screen the field *reason for action* should deploy, to choose the type of modification we want to manage.

The types of changes we may carry out are:

- **Change in Hours:** a measure to manage a change in the employee's working hours which does not involve a change in contract
- **Salary Change:** a change in the employee's salary which includes base salary, employer social security and reference bonus
- **Change in Contract:** a measure to manage a change in the employee's contract that does not involve a change in the employee's group
- **Contract Extension:** to manage the extension of the temporary contract duration
- **Transfer to fixed contract:** to manage a change in contract which also involves a change in the employee's group to "Fixed"
- **Change in Address:** an action to manage a change in the employee's home address information
- **Change in Bank Details:** to manage a change in the employee's bank details used for payroll payment and travel expenses.

|   |  |  |  |  |                  |    |          |    |
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**Copy Actions**

Person ID: 130 Pers.Assign: 130 ( 30.10.2013 - 31.12.9999 ...)

Pers.No.: 130

Name: Perez, Alejandro

EE group: 4 Extra Labour Pers.area: 0248 ES\_CASINO

EE subgroup: N2 CLA Cost Center: ES160248GE GENERIC

Start: 30.10.2013 to 31.12.9999

**Personnel action**

Action Type: Global Change

Reason for Action:  

**Status**

Customer-specific:

Employment: Active

Special payment: Standard wage type

**Organizational assignment**

Position: 30000061 WAITER Training

Personnel area: 0248 ES\_CASINO

Employee group: 4 Extra Labour

Employee subgroup: N2 CLA

**Additional actions**

| Start Date | Act. | Action Type  | ActR | Reason for action |
|------------|------|--------------|------|-------------------|
| 30.10.2013 | A2   | Hiring Extra |      |                   |

**Reason for Action (1) 9 Entries**

Restrictions


Action Type: N1  
Name of action type: Global Change

| Ac... | Name of reason for ac... |
|-------|--------------------------|
| 01    | Change in Hours          |
| 02    | Salary Change            |
| 03    | Change in Contract       |
| 04    | Legal Guardianship       |
| 05    | Partial Retirement       |
| 06    | Contract Extension       |
| 07    | Transfer to Permanent    |
| 08    | Change in Address        |
| 09    | Change in Bank Details   |

9 Entries found

Once the changes are saved, we will see different infotypes that will allow us to manage the selected change, from the change start date, indicated in the *start* field of the first screen; in case it was left in blank, the current date will be shown by default.

The different infotypes should be filled in, in the same way as indicated in the paragraph 7.1. of Hiring.

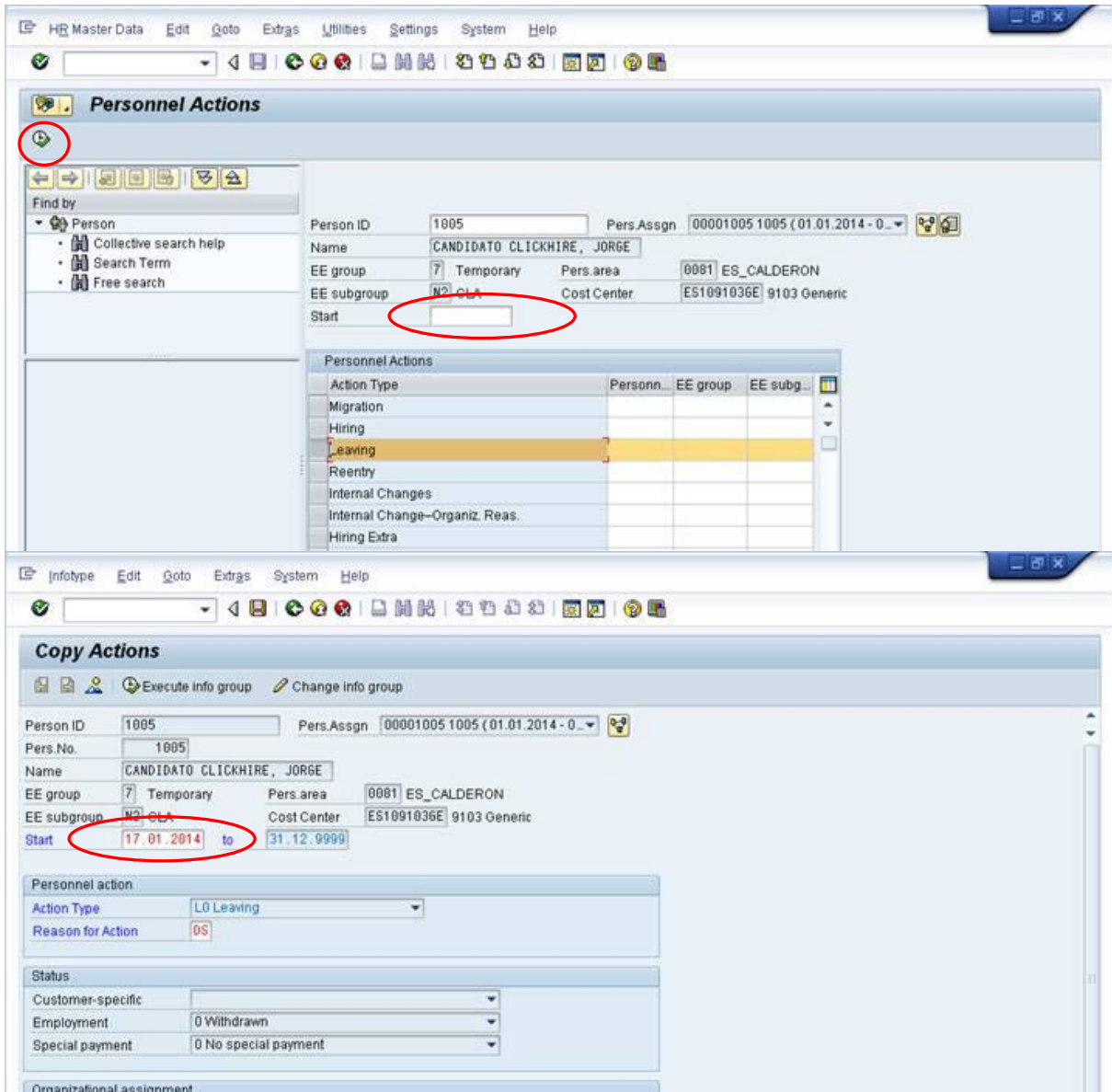
|   |  |  |  |                  |         |         |          |
|---|--|--|--|------------------|---------|---------|----------|
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## 8. Employee's leave

The employee's leave is managed through the transaction PA40; once we have selected the employee, we choose the LEAVING option and execute it.

There are two ways to manage the withdrawal process, depending on what we choose, should be report one ending date or another:

1. If you do not fill in the field "start" when choosing the leaving option, then you must do it in the following screen, by INFORMING THE DATE OF THE FIRST DAY OFF.



The image shows two SAP screenshots. The top screenshot is the 'Personnel Actions' screen for employee JORGE CANDIDATO CLICKHIRE (Person ID 1005). The 'Start' field is empty and circled in red. The 'Leaving' action is selected in the list. The bottom screenshot is the 'Copy Actions' screen for the same employee. The 'Start' field is filled with '17.01.2014' and circled in red. The 'Action Type' is 'LO Leaving' and the 'Reason for Action' is '05'.

**Personnel Actions**

Person ID: 1005 Pers.Assgn: 00001005 1005 (01.01.2014 - 0...)

Name: CANDIDATO CLICKHIRE, JORGE

EE group: 7 Temporary Pers.area: 0081 ES\_CALDERON

EE subgroup: N2 CLA Cost Center: ES1091036E 9103 Generic

Start:

**Personnel Actions**

| Action Type                    | Personn. | EE group | EE subg... |
|--------------------------------|----------|----------|------------|
| Migration                      |          |          |            |
| Hiring                         |          |          |            |
| Leaving                        |          |          |            |
| Reentry                        |          |          |            |
| Internal Changes               |          |          |            |
| Internal Change—Organiz. Reas. |          |          |            |
| Hiring Extra                   |          |          |            |

**Copy Actions**

Person ID: 1005 Pers.Assgn: 00001005 1005 (01.01.2014 - 0...)

Pers.No.: 1005

Name: CANDIDATO CLICKHIRE, JORGE

EE group: 7 Temporary Pers.area: 0081 ES\_CALDERON

EE subgroup: N2 CLA Cost Center: ES1091036E 9103 Generic

Start: 17.01.2014 to 31.12.9999

**Personnel action**

Action Type: LO Leaving

Reason for Action: 05


**Status**

Customer-specific:

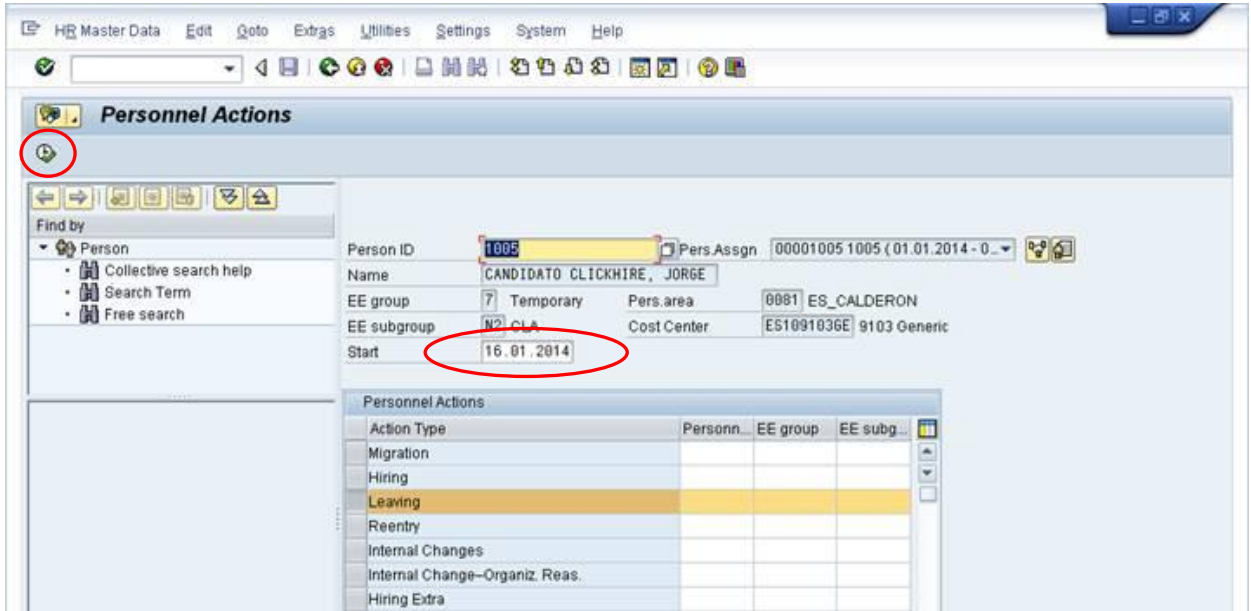
Employment: 0 Withdrawn

Special payment: 0 No special payment

**Organizational assignment**

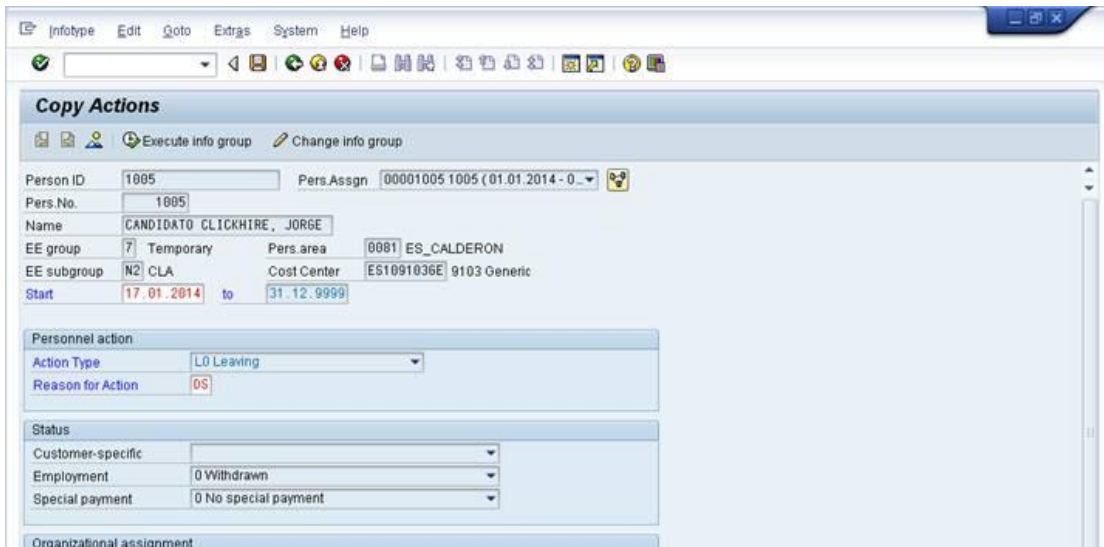
|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:24  |    |
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- If the field “start” is filled in the first PA40 screen when choosing the leaving option, the DATE MUST BE INFORMED.




The screenshot shows the SAP Personnel Actions (PA40) screen. The 'Start' date field is highlighted with a red circle and contains the value '16.01.2014'. The 'Leaving' action type is selected in the list below.

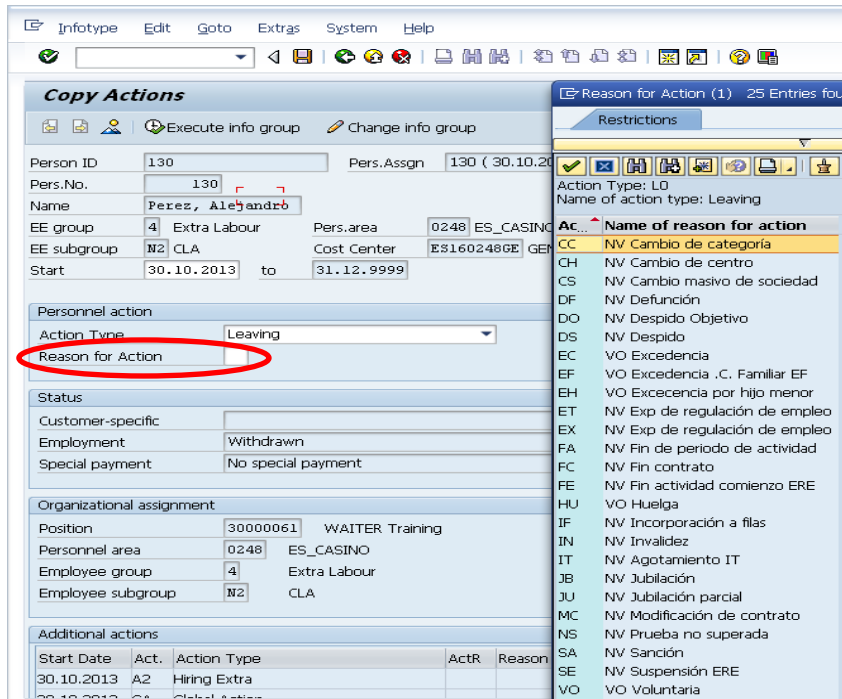
In both options, the infotype 0 “Actions” will have the same day recorded, the employee’s first day off.



The screenshot shows the SAP Copy Actions (PA40) screen. The 'Start' date field is highlighted with a red circle and contains the value '17.01.2014'. The 'Reason for Action' field is set to '05'.

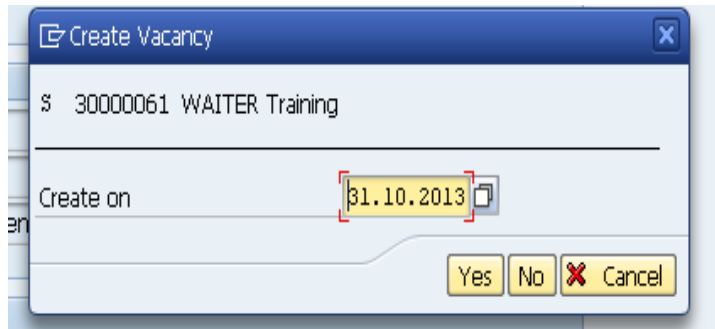
Then we choose the reason of the withdrawal in the field Reason for Action and save.

|  |  |  |                  |    |          |    |
|--|--|--|------------------|----|----------|----|
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The screenshot shows the SAP 'Copy Actions' dialog box. The 'Reason for Action' field is circled in red. The 'Reason for Action' dropdown is open, showing a list of reasons for action, including 'NV Cambio de categoría', 'NV Cambio de centro', 'NV Cambio masivo de sociedad', 'NV Defunción', 'NV Despido Objetivo', 'NV Despido', 'VO Excedencia', 'VO Excedencia .C. Familiar', 'VO Excedencia por hijo menor', 'NV Exp de regulación de empleo', 'NV Exp de regulación de empleo', 'NV Fin de periodo de actividad', 'NV Fin contrato', 'NV Fin actividad comienzo ERE', 'VO Huelga', 'NV Incorporación a filas', 'NV Invalidez', 'NV Agotamiento IT', 'NV Jubilación', 'NV Jubilación parcial', 'NV Modificación de contrato', 'NV Prueba no superada', 'NV Sanción', 'NV Suspensión ERE', and 'VO Voluntaria'.


A screen will be displayed, asking us whether to create a vacancy for the position the employee has left. Click on the option *No*, so that the vacancy request will be needed, as the approval workflow is compulsory.



The screenshot shows the 'Create Vacancy' dialog box. The 'Create on' date is set to 31.10.2013. The 'Yes' button is highlighted.

The position will become free and it can be chosen through Click & Hire when applying for a vacancy. Then, the employee will have a generic position 99999999, which is not a “seat” of the organizational structure.



|   |  |  |  |  |                  |    |          |    |
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## 9. Reentry

This option is provided for those contracts of the employees previously hired in the Company, and that is why we already have their data in the application.

To manage a reentry, we enter in the transaction PA40 and choose the person we want to rehire, click on REENTRY and then click on execute.


In the **infotype 0000 ACTIONS**, we will report the date of the new hiring in the field *start*; when saved, we will see an informational notification confirming the dates for the historical information of the employee.

The infotypes already seen in the paragraph 7.1 of Hiring will be displayed, with the fields filled in, proposing the data of the last hiring, so we should modify them when necessary. We should click on the save icon, for all the infotypes displayed.

## 10. Organizational reassignment

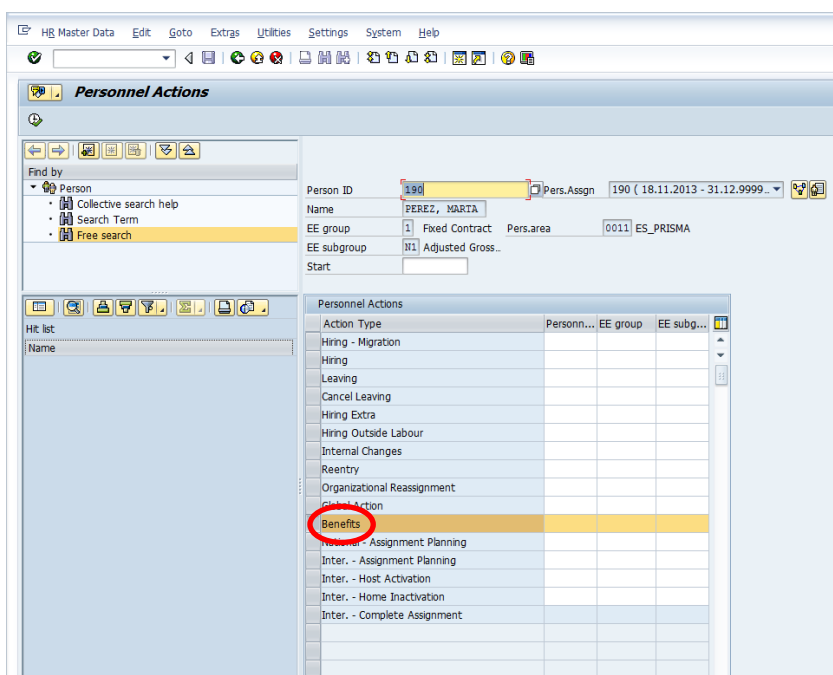
This option is used when we have to manage a position change of an employee (work center, department or job change). It is processed in the transaction PA40, where we chose an employee to change and click on ORGANIZATIONAL REASSIGNMENT.

We should report the new organizational data of the employee in the fields of the *organizational assignment* paragraph, of the first infotype that is displayed (Actions); save the data and view the infotype 0001, where we should fill in the field *Location*, to indicate the physical location of the employee. Once saved, the infotypes already seen in the paragraph 7.1 of Hiring will be displayed, that we are going to change with relevant data and saving the corresponding screens.

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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|   | ID   |  |  |  | Version          | 01 | Revision | 00 |

## 11. Benefits

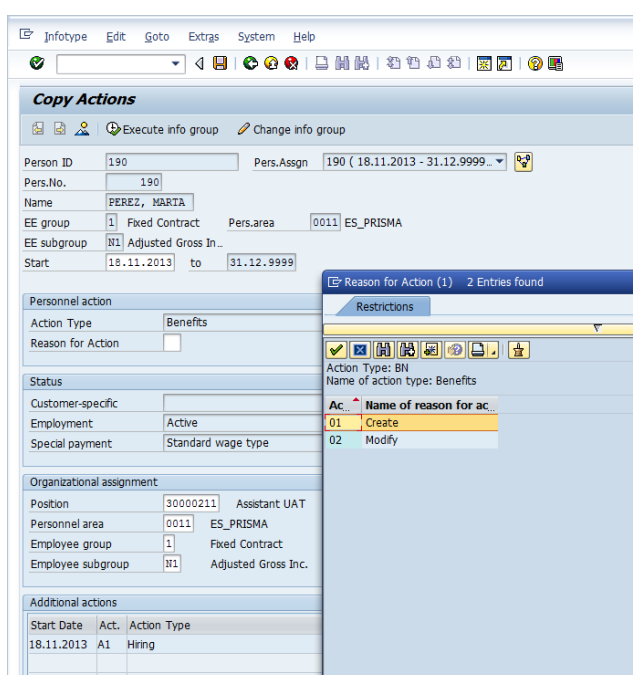
The benefits of the employee, the flexible remuneration and the received bonus, will be reported in SAP in the transaction Benefits, which may be accessed from the PA40.



When hiring an employee, by default the infotype 0171 General Benefits Information will be created, which will allow to later report the benefits, either corresponding to the infotype 0167 Health Plan, or those of 0377 Miscellaneous.

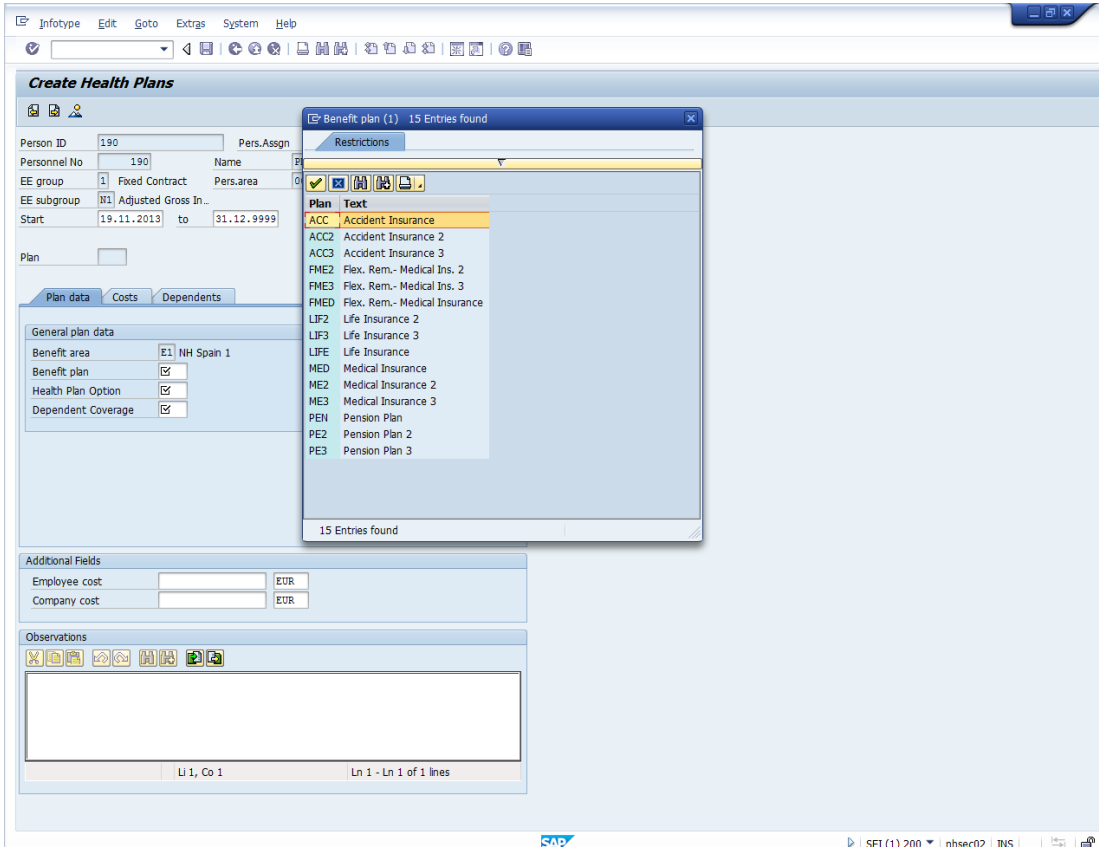
To do so, we will search the employee and click on the execute icon.

Automatically the attached screen will be displayed, where we should fill in the field *reason for action*, indicating *create* if we are going to introduce new benefits of the employee.



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Once all the data is saved, the **infotype 0167 Health Plan** will be displayed, where we may report the following benefits of the employee: accident insurance, health insurance of flexible remuneration, life insurance, health insurance and pension plan.



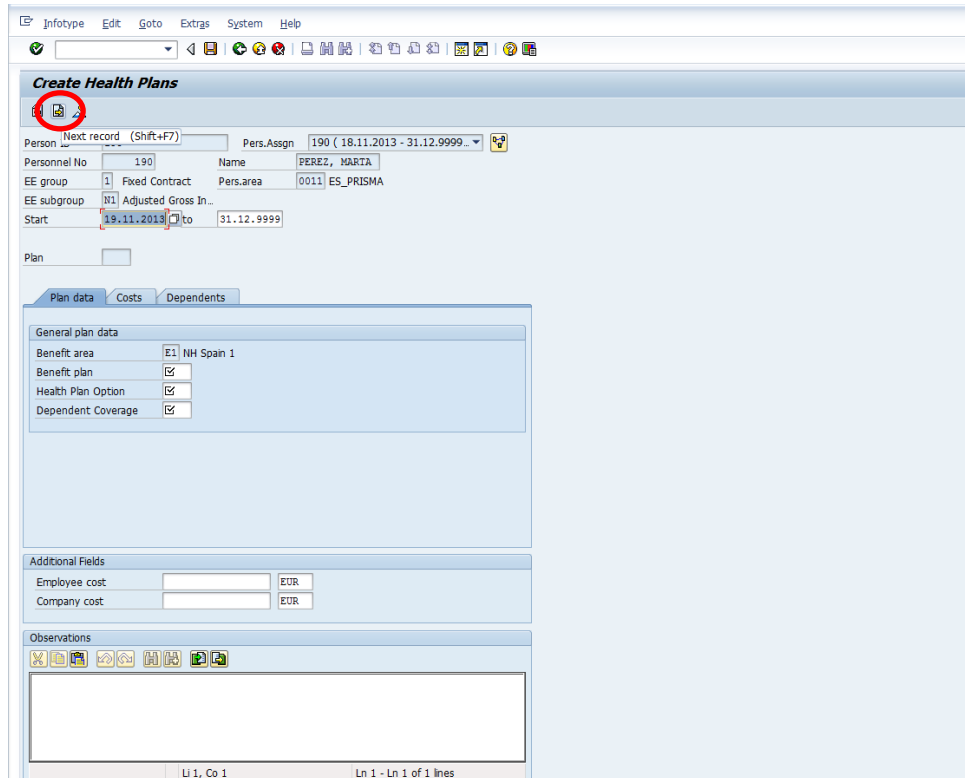
In this infotype we will see the following fields:

- **Benefit area:** filled in by default, according to the country. In case of a second assignment, we should choose the area corresponding to that country.
- **Benefit plan / health plan option:** necessary to indicate the benefits employee has a right to.
- **Dependent coverage:** in this field the included beneficiaries should be indicated.
- **Company cost:** we should indicate the cost assumed by the Company; it will be monthly or annual, according to the Company's procedure.
- **Employee cost:** in case the cost of the benefits is passed on the employee, it should be reported in this field; either with a monthly or an annual amount, according to the procedure established by the Company.

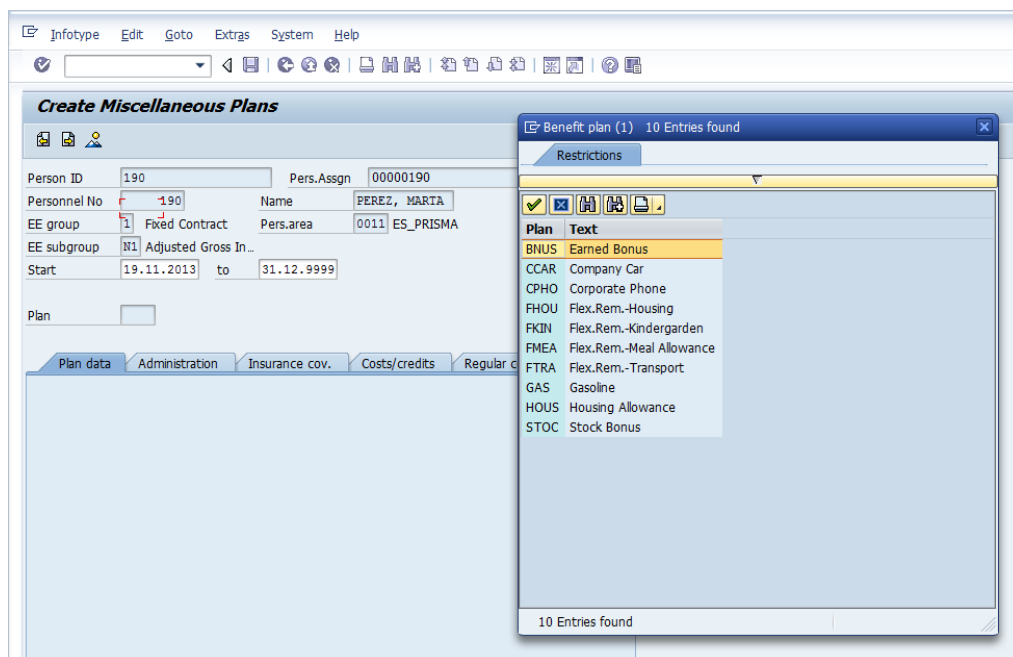
Once saved, a new screen will be displayed, to report more benefits of the infotype 0167 Health Plan.

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:29  |    |
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In case we don't want to fill in more benefits in this infotype, we will click on the icon next, to access the infotype 0377 Miscellaneous.



In this infotype we may report the rest of the benefits the employee will have, such as: company car, corporate phone, ...

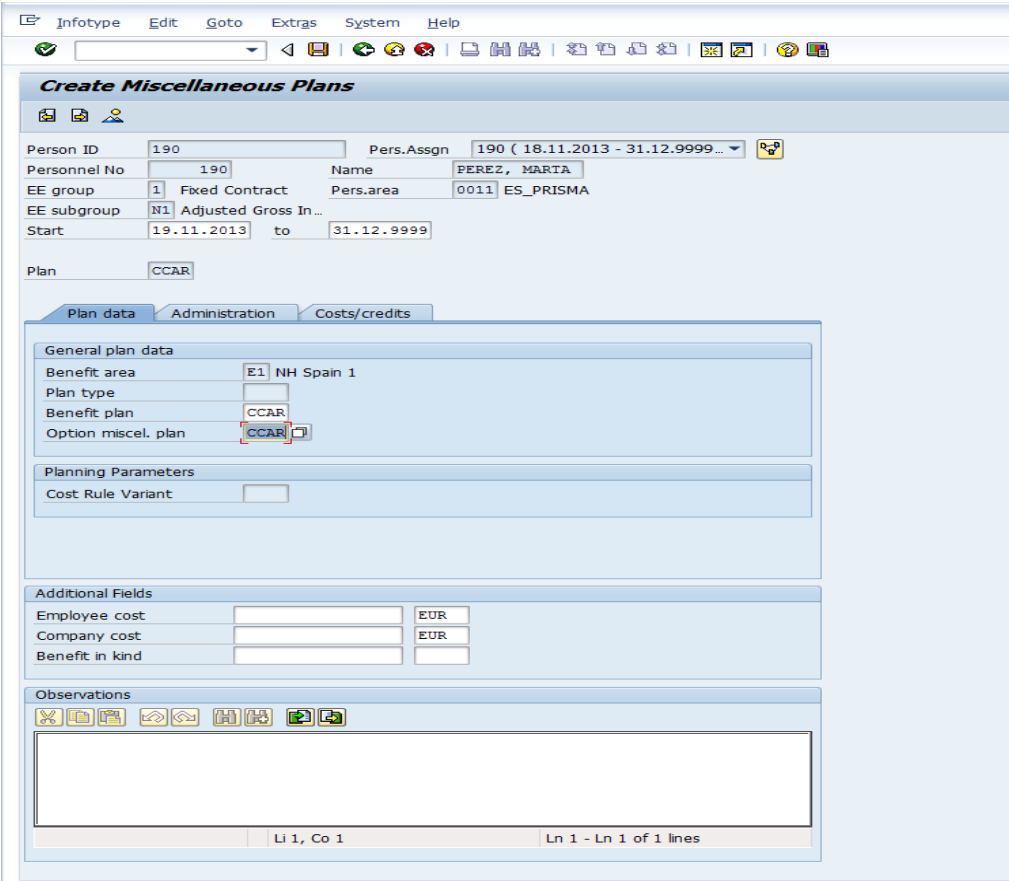


| Plan | Text                     |
|------|--------------------------|
| BNUS | Earned Bonus             |
| CCAR | Company Car              |
| CPHO | Corporate Phone          |
| FHOH | Flex.Rem.-Housing        |
| FKIN | Flex.Rem.-Kindergarden   |
| FMEA | Flex.Rem.-Meal Allowance |
| FTRA | Flex.Rem.-Transport      |
| GAS  | Gasoline                 |
| HOUS | Housing Allowance        |
| STOC | Stock Bonus              |

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:30  |    |
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The fields we will see in this infotype are:

- *Benefit plan and optional miscellaneous plan*, where we will indicate the type of benefit we would like to report for this employee.
- *Company cost*: to report the cost assumed by the Company, monthly or annual, according to the procedure established by the Company.
- *Employee cost*: this field will be used to report the cost of the benefit that will be passed on to the employee, in case there is one; either by monthly or annual amount, according to the Company's procedure.
- *Benefit in Kind*: in this field we should report the taxable amount of the benefit.
- *Observations*: will be used, according to the procedure of the Company, to detail some data of the benefit, such as: policy number, model and car license plate number, renting contract number,...



**Create Miscellaneous Plans**

Person ID: 190 Pers.Assgn: 190 ( 18.11.2013 - 31.12.9999...)

Personnel No: 190 Name: PEREZ, MARTA

EE group: 1 Fixed Contract Pers.area: 0011 ES\_PRISMA

EE subgroup: N1 Adjusted Gross In...

Start: 19.11.2013 to: 31.12.9999

Plan: CCAR

**Plan data** Administration Costs/credits

**General plan data**

Benefit area: E1 NH Spain 1

Plan type:

Benefit plan: CCAR

Option miscel. plan: CCAR

**Planning Parameters**

Cost Rule Variant:

**Additional Fields**


Employee cost: EUR

Company cost: EUR

Benefit in kind:

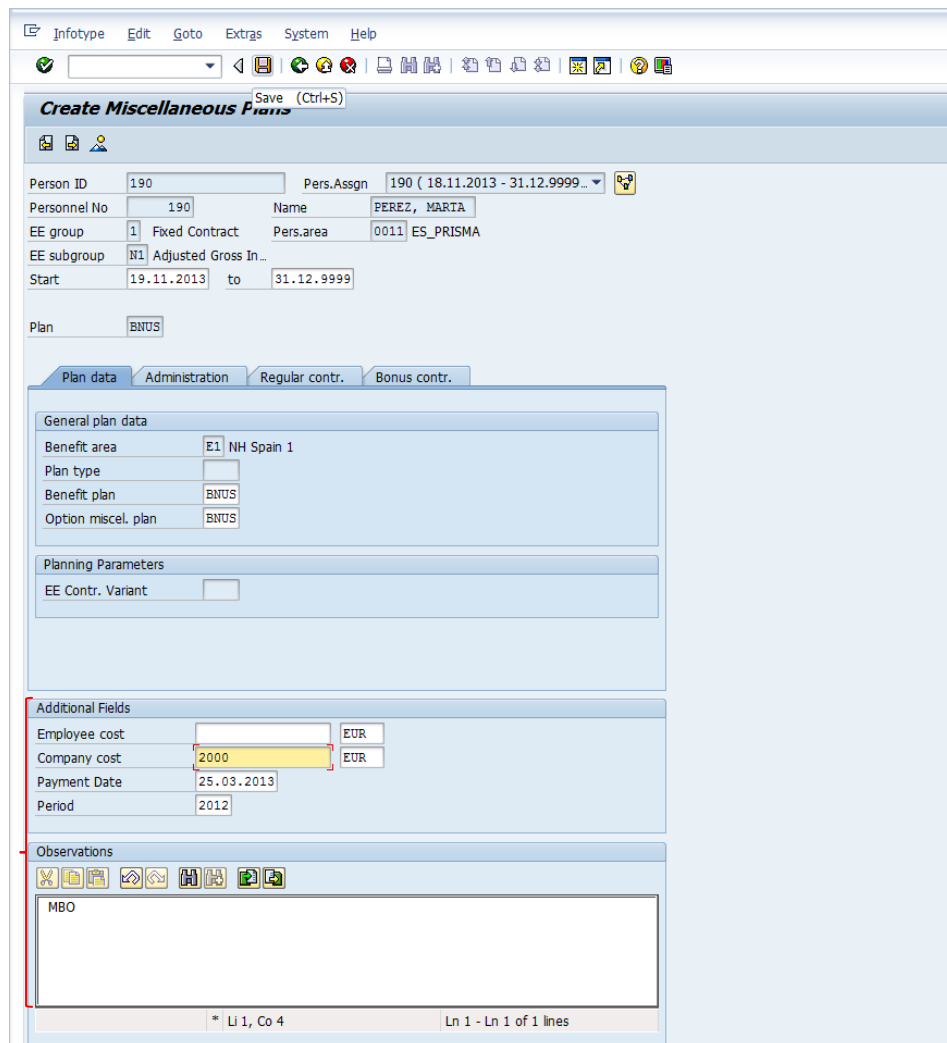
**Observations**

Li 1, Co 1 Ln 1 - Ln 1 of 1 lines

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:31  |    |
|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
|   | ID   |  |  |  | Version          | 01 | Revision | 00 |

If the benefit we want to report is Earned Bonus, we should indicate the amount of earned bonus in the field *company cost*; additionally we should report the fields *payment date* and *period*. In the first one, the date of the payment will be reported, and in the second one, the year of accrual of the bonus.

In the observations field we may indicate the variable remuneration program that encourages the payment of this bonus (e.g.: MBO).




The screenshot shows the SAP 'Create Miscellaneous Plans' form. The 'Person ID' is 190, 'Pers. Assign' is 190 (18.11.2013 - 31.12.9999), 'Personnel No' is 190, 'Name' is PEREZ, MARTA, 'EE group' is 1 Fixed Contract, 'Pers. area' is 0011 ES\_PRISMA, 'EE subgroup' is N1 Adjusted Gross In..., 'Start' is 19.11.2013 to 31.12.9999, and 'Plan' is BNUS.

The 'Plan data' tab is active, showing 'General plan data' with 'Benefit area' E1 NH Spain 1, 'Plan type' empty, 'Benefit plan' BNUS, and 'Option miscel. plan' BNUS. 'Planning Parameters' shows 'EE Contr. Variant' empty.

The 'Additional Fields' section shows 'Employee cost' empty, 'Company cost' 2000, 'Payment Date' 25.03.2013, and 'Period' 2012. All currency fields are set to EUR.

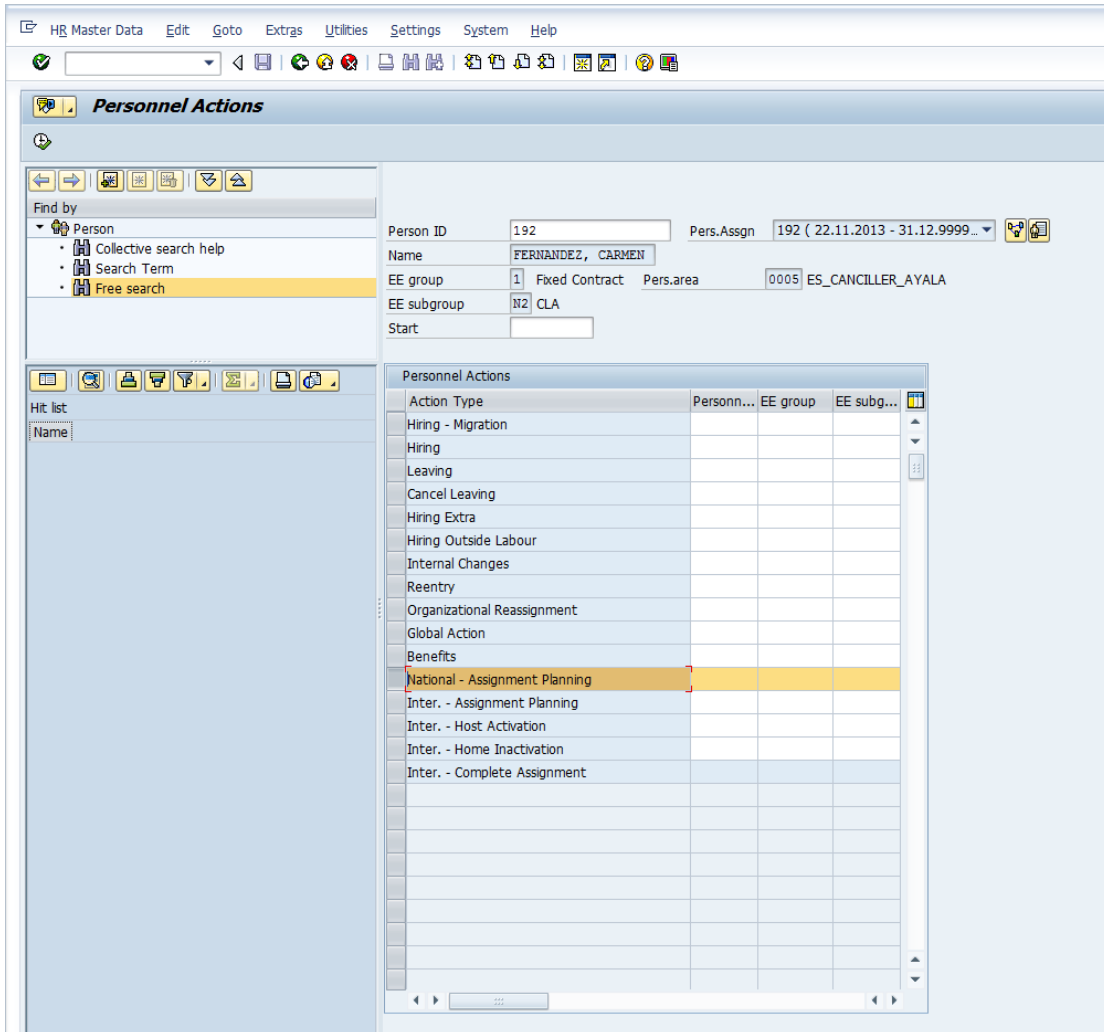
The 'Observations' section contains the text 'MBO'.

At the bottom, it shows '\* Li 1, Co 4' and 'Ln 1 - Ln 1 of 1 lines'.

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:32  |    |
|   | Title: Personnel Administration            |  |  |  |                  |    |          |    |
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## 12. Double national assignment

This transaction allows to register a new employee assignment, so that on the national level he has a double assignment. To do so, we execute the transaction PA40, mark the option NATIONAL - ASSIGNMENT PLANNING and execute.




The screenshot shows the SAP Personnel Actions (PA40) transaction. The 'Find by' section on the left has 'Person' selected. The main area displays the following data:

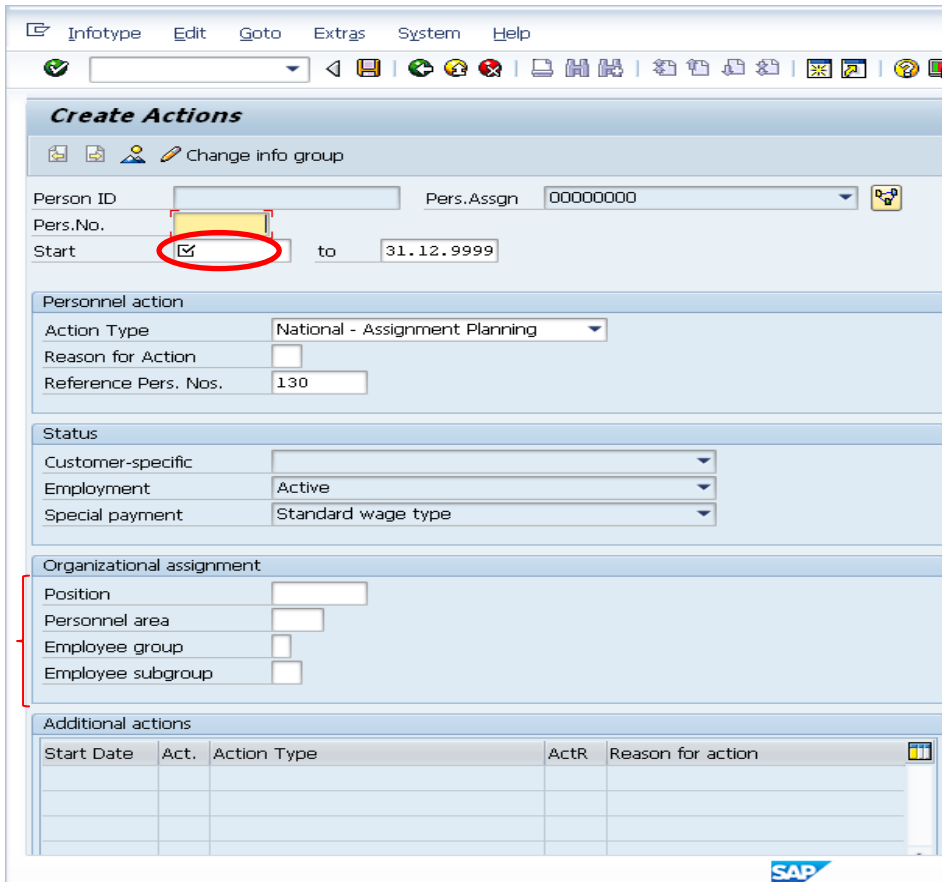
- Person ID: 192
- Name: FERNANDEZ, CARMEN
- EE group: 1 Fixed Contract
- Pers.area: 0005 ES\_CANCELLER\_AYALA
- EE subgroup: N2 CLA
- Start: (empty field)

The 'Personnel Actions' table is displayed with the following columns: Action Type, Person..., EE group, and EE subg... The table contains the following rows:

| Action Type                    | Person... | EE group | EE subg... |
|--------------------------------|-----------|----------|------------|
| Hiring - Migration             |           |          |            |
| Hiring                         |           |          |            |
| Leaving                        |           |          |            |
| Cancel Leaving                 |           |          |            |
| Hiring Extra                   |           |          |            |
| Hiring Outside Labour          |           |          |            |
| Internal Changes               |           |          |            |
| Reentry                        |           |          |            |
| Organizational Reassignment    |           |          |            |
| Global Action                  |           |          |            |
| Benefits                       |           |          |            |
| National - Assignment Planning |           |          |            |
| Inter. - Assignment Planning   |           |          |            |
| Inter. - Host Activation       |           |          |            |
| Inter. - Home Inactivation     |           |          |            |
| Inter. - Complete Assignment   |           |          |            |

We will see the infotype 0000 ACTIONS, where we should fill in: the date in the field Start and the new position, personnel area, employee group and subgroup; once the fields are filled in, we will save the information.

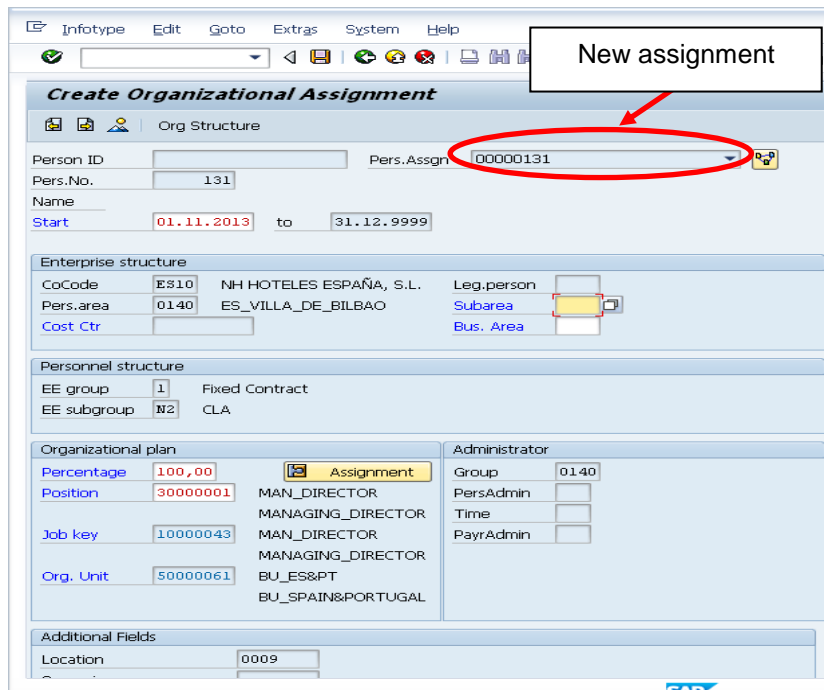
|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
|  | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:33  |    |
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|   | ID   |  |  |  | Version          | 01 | Revision | 00 |




Once the information is saved, the infotype 0001 ORGANIZATIONAL ASSIGNMENT will be displayed, with the number of the new assignment.

In this infotype we should fill in the mandatory fields: Subarea, Bus.Area and Location.

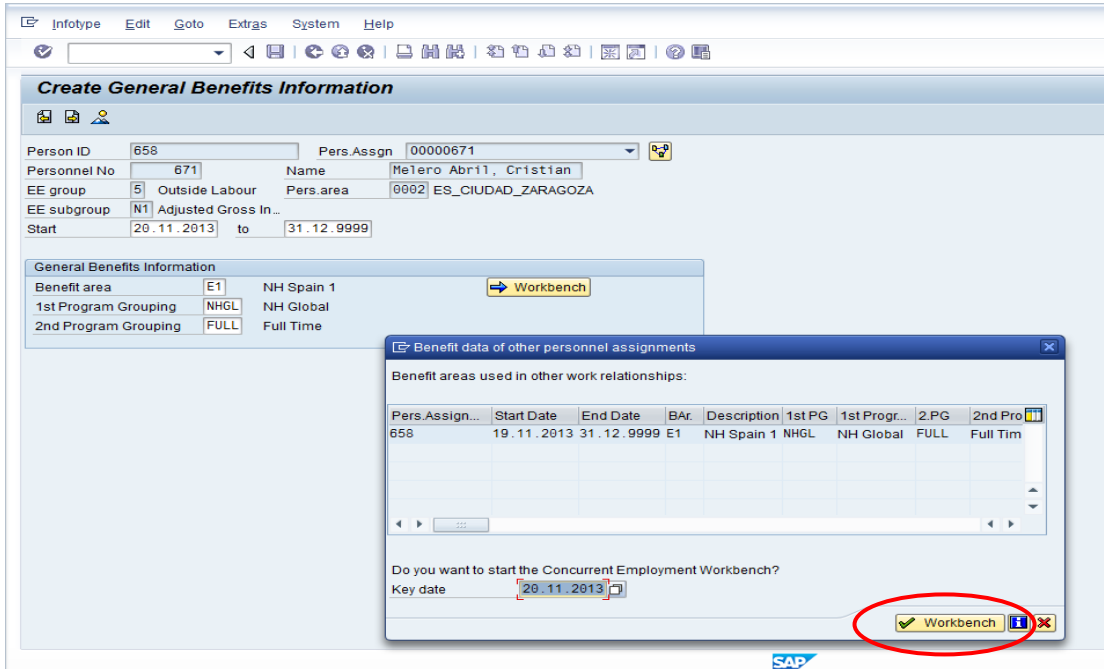
Once saved, we will pass through the screens already viewed in the paragraph 7.1 HIRING and filling in the data necessary for this new assignment.





|  |  |  |  |  |                  |    |          |    |
|--|--|--|--|--|------------------|----|----------|----|
| <br>HOTELES | Project: SAP training manual for end users |  |  |  | Date: 14/05/2014 |    | Page:34  |    |
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In the infotype of benefits, in case the employee has different benefits for each assignment, we should create a new benefits area for the second assignment. When executing this hiring, the infotype 0171 GENERAL BENEFITS INFORMATION will be automatically created for the second assignment, that will allow to create the new benefits area.



The screenshot shows the SAP 'Create General Benefits Information' screen. The main form contains fields for Person ID (658), Personnel No (671), Name (Mejero Abr11, Cristian), EE group (5), Outside Labour, Pers.area (0002 ES\_CIUDAD\_ZARAGOZA), EE subgroup (N1), Adjusted Gross In..., Start (20.11.2013), and to (31.12.9999). Below these are 'General Benefits Information' fields: Benefit area (E1), 1st Program Grouping (NHGL), 2nd Program Grouping (FULL), NH Spain 1, NH Global, and Full Time. A 'Workbench' button is visible. A dialog box titled 'Benefit data of other personnel assignments' is open, showing a table of benefit areas used in other work relationships. The table has columns: Pers.Assign..., Start Date, End Date, BA., Description, 1st PG, 1st Progr..., 2.PG, and 2nd Pro. The first row shows data for Person 658. At the bottom of the dialog, there is a question 'Do you want to start the Concurrent Employment Workbench?' with a 'Key date' field set to 20.11.2013. A 'Workbench' button with a green checkmark is circled in red.


| Pers.Assign... | Start Date | End Date   | BA. | Description     | 1st PG    | 1st Progr... | 2.PG     | 2nd Pro |
|----------------|------------|------------|-----|-----------------|-----------|--------------|----------|---------|
| 658            | 19.11.2013 | 31.12.9999 | E1  | NH Spain 1 NHGL | NH Global | FULL         | Full Tim |         |

On this screen we will see the information of the benefits area related to the first assignment. The date indicated in the field "Key date" is the date starting from which the infotype 0171 will be created. It is important to take into consideration this date for future creation of the benefits, as they can not be created with a date prior to the one reported in this field. Clicking on "Workbench", we will access the screen allowing to create the area for the new assignment.



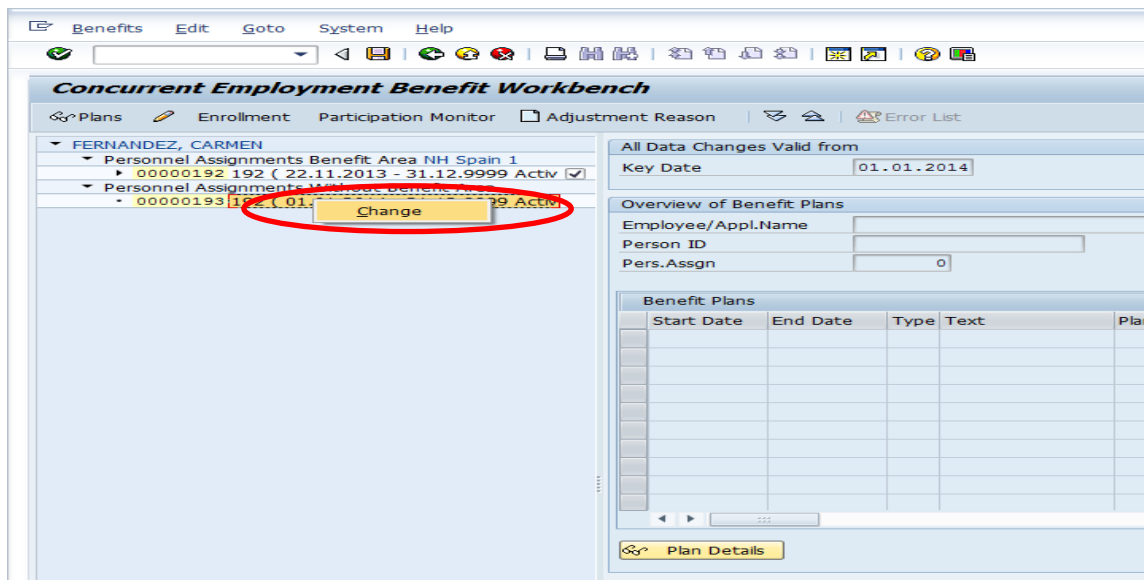
This is a close-up of the 'Benefit data of other personnel assignments' dialog box. It shows the same table as the previous screenshot. At the bottom, the 'Key date' field is circled in red and contains the date 20.11.2013. The 'Workbench' button with a green checkmark is also circled in red.

| Pers.Assign... | Start Date | End Date   | BA. | Description     | 1st PG    | 1st Progr... | 2.PG     | 2nd Pro |
|----------------|------------|------------|-----|-----------------|-----------|--------------|----------|---------|
| 658            | 19.11.2013 | 31.12.9999 | E1  | NH Spain 1 NHGL | NH Global | FULL         | Full Tim |         |

|   |  |  |  |                  |         |         |          |
|---|--|--|--|------------------|---------|---------|----------|
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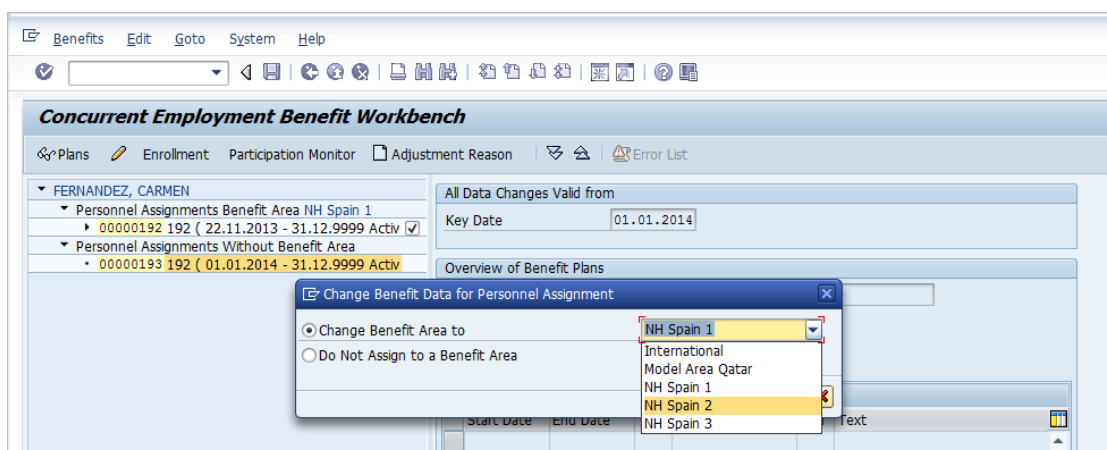
We will see a screen with the two assignments the employee will have and the benefits area of each one. For the first one, the benefits area is “NH Spain 1”, and the second one doesn’t have any assigned by default.

Clicking on this second assignment with the right mouse button, the option *change*, that we should select, will be displayed.




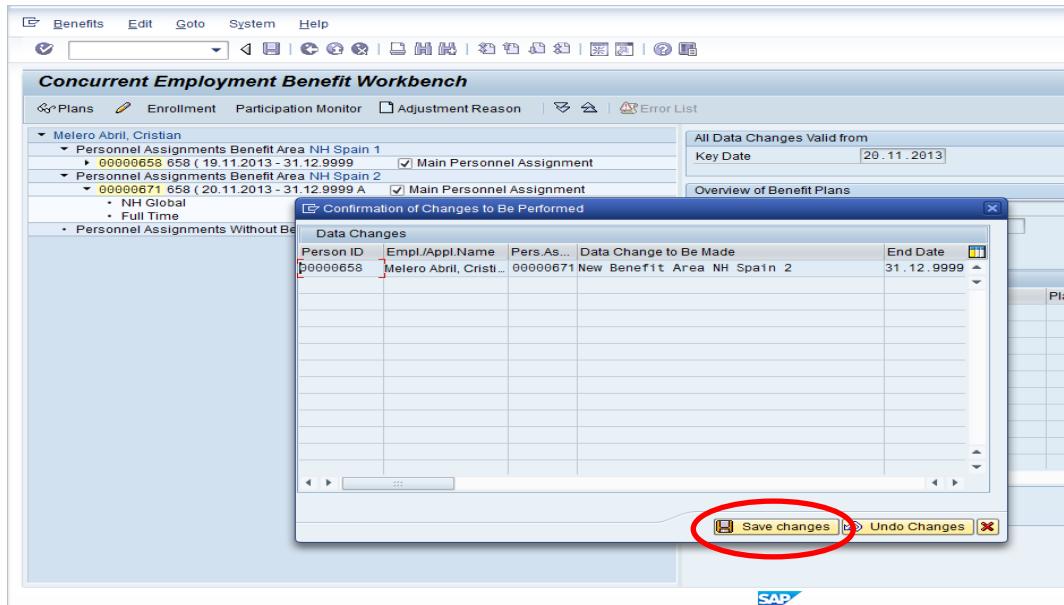
We will see a screen showing by default the option *change benefit area to*, and clicking on the dropdown menu, another screen will appear, allowing us to select another benefits area for this assignment.


In this case, we will select the area “NH Spain 2”, so the two different benefits areas will be set for each assignment.



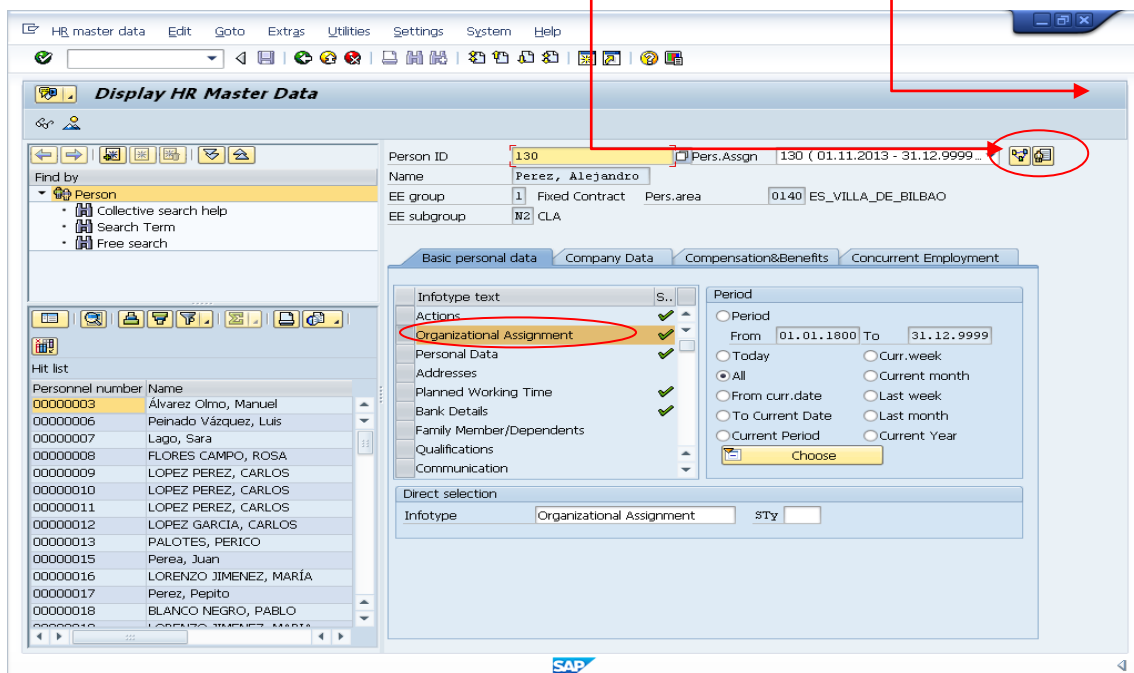
Then the change will be saved, and the window with changes confirmation will be opened.


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Once the assignment is finished, we should go back to continue with the benefits creation. To do so, we should select the icon , and the infotype 0167 HEALTH PLAN will be displayed, where we may report the corresponding benefits. Once saved, we will access the infotype 0377 MISCELLANEOUS, to continue reporting the rest of the necessary benefits.

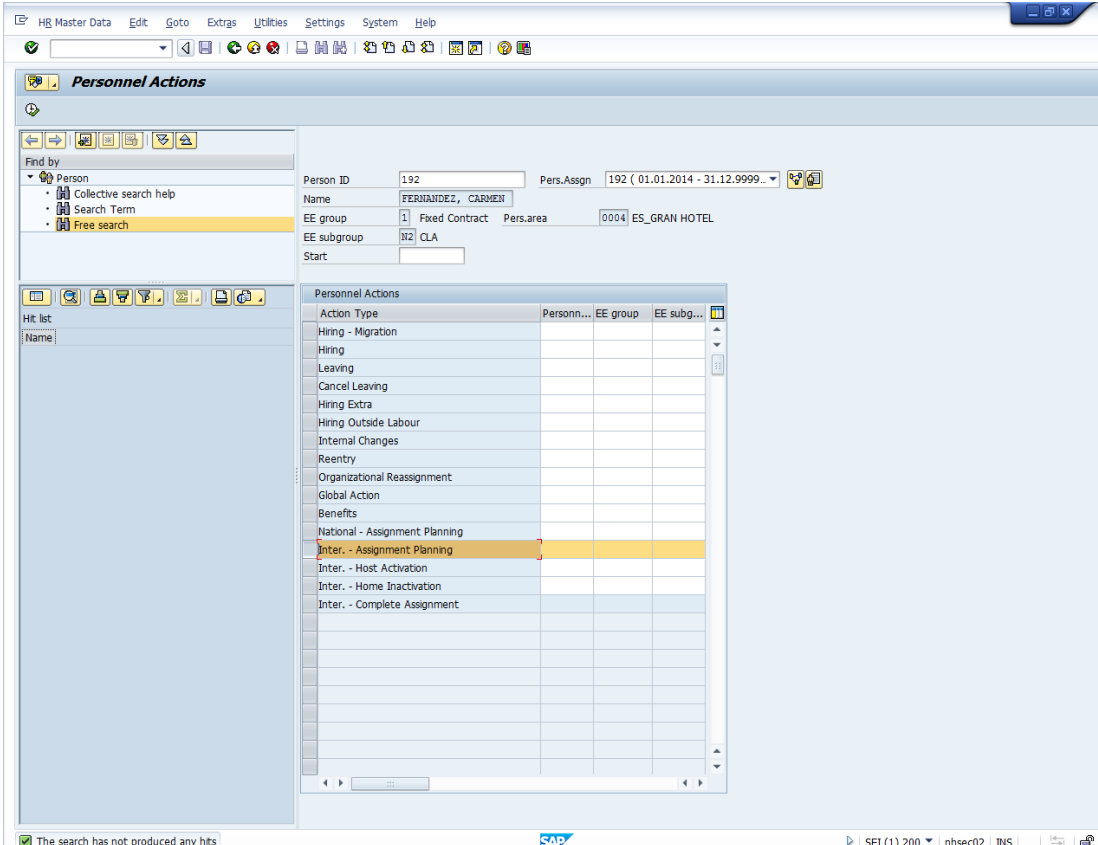
With the transaction PA20 we may view all the employee's assignments. Clicking on the icons of Assignment Overview y Assignment Details, we will have more information of the assignment.



|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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### 13. International assignment


This transaction allows to create employee's international assignment, either expat of long or short duration, global employee or international transfer. To do so, in the PA40, select the option INTER – ASSIGNMENT PLANNING and click on the execute icon.

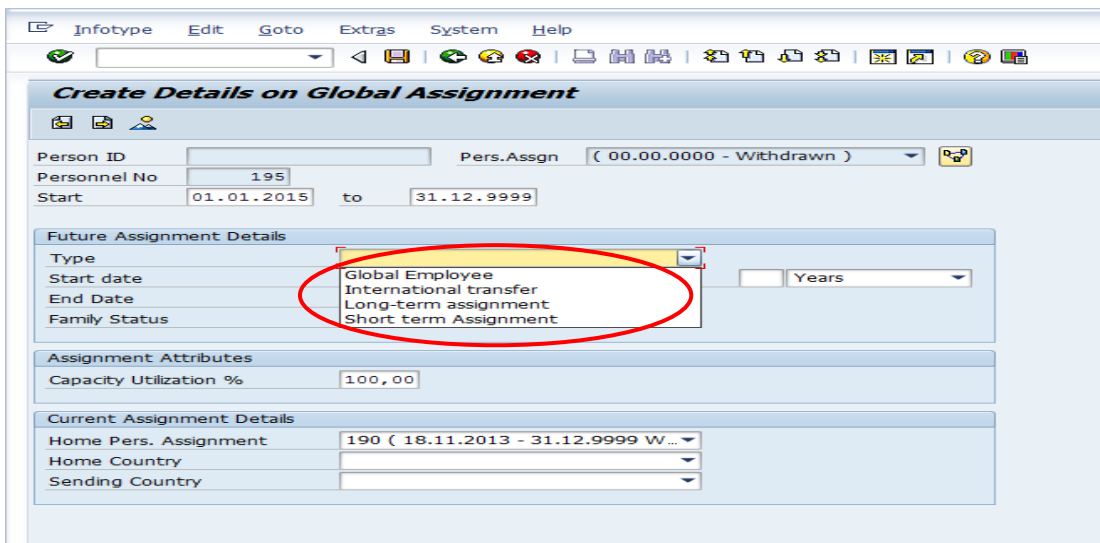


The screenshot displays the SAP Personnel Actions (PA40) transaction. The top bar shows the menu: HR Master Data, Edit, Goto, Extras, Utilities, Settings, System, Help. The main area is titled 'Personnel Actions'. On the left, there is a 'Find by' section with options: Person, Collective search help, Search Term, and Free search. Below this is a 'Hit list' with a 'Name' field. The central area contains input fields for: Person ID (192), Name (FERNANDEZ, CARMEN), Pers.Assign (192 ( 01.01.2014 - 31.12.9999...)), EE group (1 Fixed Contract), Pers.area (0004 ES\_GRAN HOTEL), EE subgroup (02 CLA), and Start. On the right, there is a list of 'Personnel Actions' with columns: Action Type, Person..., EE group, and EE subg... The list includes various actions like Hiring - Migration, Hiring, Leaving, Cancel Leaving, Hiring Extra, Hiring Outside Labour, Internal Changes, Reentry, Organizational Reassignment, Global Action, Benefits, National - Assignment Planning, Inter. - Assignment Planning (highlighted), Inter. - Host Activation, Inter. - Home Inactivation, and Inter. - Complete Assignment. At the bottom, a status bar indicates 'The search has not produced any hits' and 'SEI (1) 200 | nhsec02 | INS'.

In the first infotype displayed, we will report the fields of the paragraph *organizational assignment* and the field *start* with the new assignment's start date; once saved, the infotype PERSONAL DATA will be displayed, that we should always save, so that the new assignment is correctly created.

In the infotype Organizational Assignment we will indicate the position in the country of destination, in case we don't know it, we may report the general value 9999999; once the information is saved, the **infotype 0710 DETAILS ON GLOBAL ASSIGNMENT** will be displayed, where we may indicate the type of international assignment: expat of long or short duration, global employee or international transfer.

|   |  |  |                  |    |          |    |
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**Create Details on Global Assignment**

Person ID:  Pers.Assgn: ( 00.00.0000 - Withdrawn )

Personnel No: 195

Start: 01.01.2015 to 31.12.9999

**Future Assignment Details**

Type: Global Employee  
International transfer  
Long-term assignment  
Short term Assignment  Years

**Assignment Attributes**

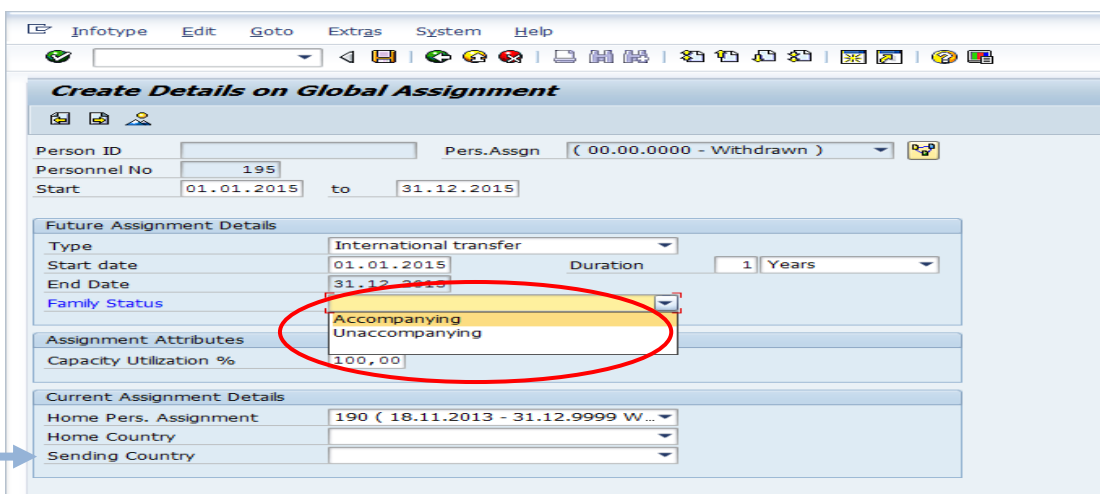
Capacity Utilization %: 100,00

**Current Assignment Details**

Home Pers. Assignment: 190 ( 18.11.2013 - 31.12.9999 W...  
Home Country:   
Sending Country:

En the field *duration*, we will report the numerical value of the international assignment period, and the value in days, months or years, as appropriate.

In the field *family status*, we should indicate if the employee will be accompanied or no, by his family.



**Create Details on Global Assignment**

Person ID:  Pers.Assgn: ( 00.00.0000 - Withdrawn )

Personnel No: 195

Start: 01.01.2015 to 31.12.2015

**Future Assignment Details**

Type: International transfer

Start date: 01.01.2015 Duration: 1 Years

End Date: 31.12.2015

Family Status: Accompanying  
Unaccompanying

**Assignment Attributes**


Capacity Utilization %: 100,00

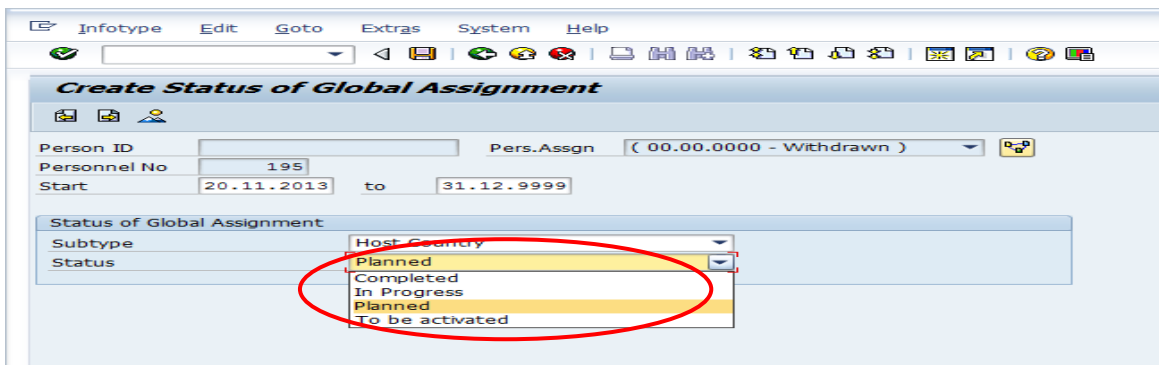
**Current Assignment Details**

Home Pers. Assignment: 190 ( 18.11.2013 - 31.12.9999 W...  
Home Country:   
Sending Country:

**Sending Country:** this field should be filled in with the country where the employee is transferred.

In the next infotype STATUS OF GLOBAL ASSIGNMENT, we will report the status of the process in general, if we select *planned*, it means we haven't finished to fill in all the data, if we select *to be activated*, it means we are already enabling the country of destination to view the employee and activate the new assignment in that country.

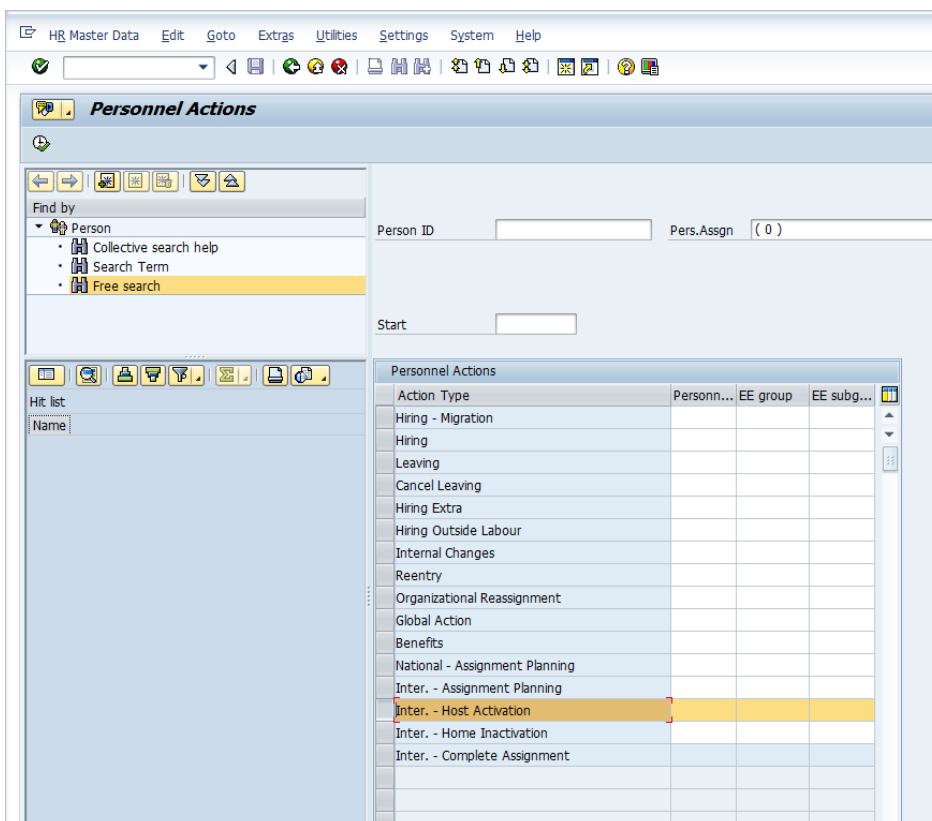
|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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The screenshot shows the 'Create Status of Global Assignment' dialog in SAP. The 'Status' dropdown menu is open, displaying a list of status options: 'Planned', 'Completed', 'In Progress', 'Planned', and 'To be activated'. The first 'Planned' option is highlighted with a red circle, indicating it is the selected status.

The infotype FAMILY MEMBER / DEPENDENTS will be displayed, to report the data corresponding to the employee's relatives; in case he travels with them, we should choose the field accompanying.


Already in the country of destination, we should carry out the transaction **INTER. – HOST ACTIVATION**, to activate the assignment in the new country.



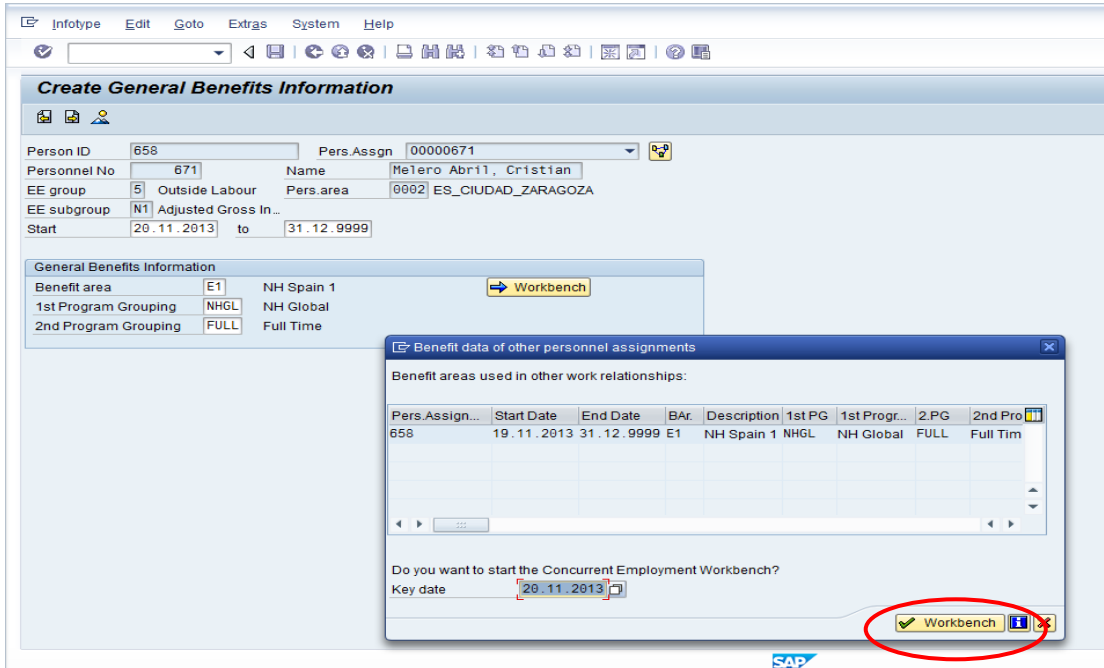
The screenshot shows the 'Personnel Actions' table in SAP. The table has columns for 'Action Type', 'Personn...', 'EE group', and 'EE subg...'. The row 'Inter. - Host Activation' is highlighted in yellow, indicating it is the selected action type.

By default, the current date will be displayed, though we may change it, usually we indicate the date next to the day reported as the end of the assignment in withdraw status.

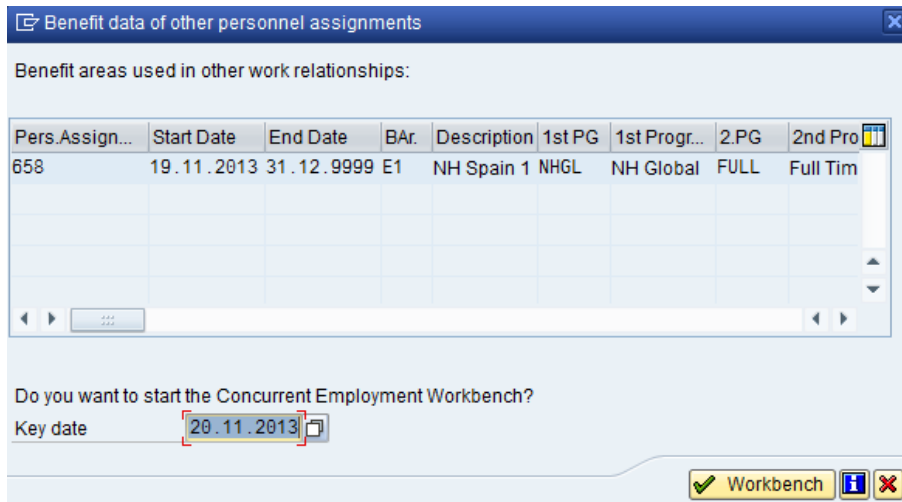
Once saved, we will pass through different infotypes already seen in the paragraph 7.1 Hiring, where we may change the necessary data and save the changes.


|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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If an employee has different benefits for each assignment, we should create a new benefits area for the second assignment. It is done by creating the infotype 0171 GENERAL BENEFITS INFORMATION for the second assignment; the creation of this infotype appears automatically, when we are carrying out the hiring of the second assignment.

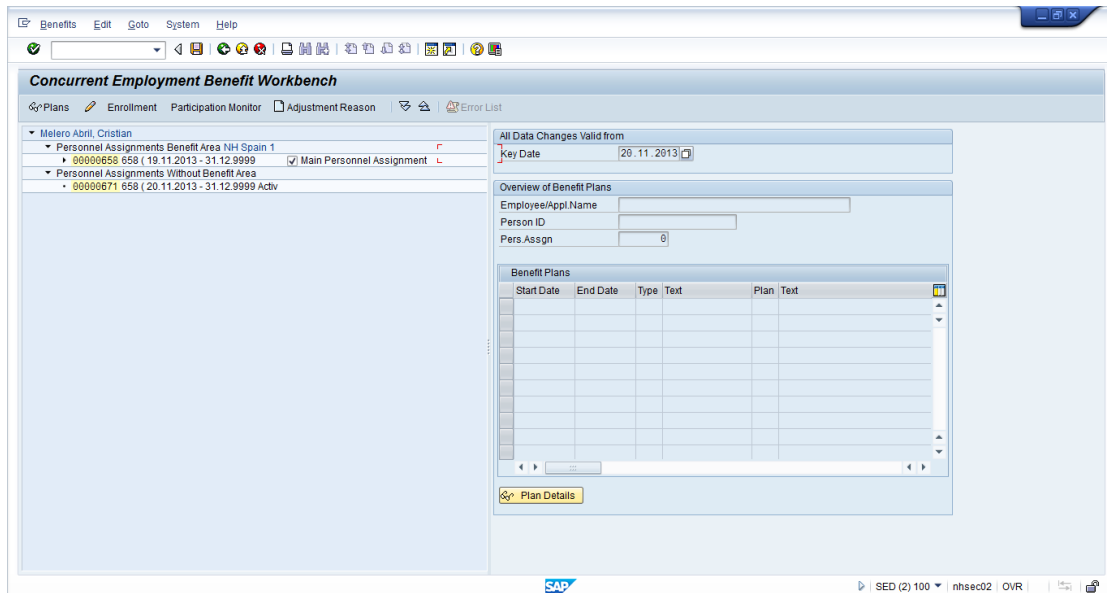


On this screen we will see the information of the benefits area corresponding to the first assignment. The date indicated in the field "Key date" is the day starting from which the infotype 0171 will be created. It is important to take into consideration this date for the future creation of benefits, as we can not create those with a date prior to the one reported in this field. Clicking on the "Workbench" button, we may access the screen allowing to create the area for the new assignment.

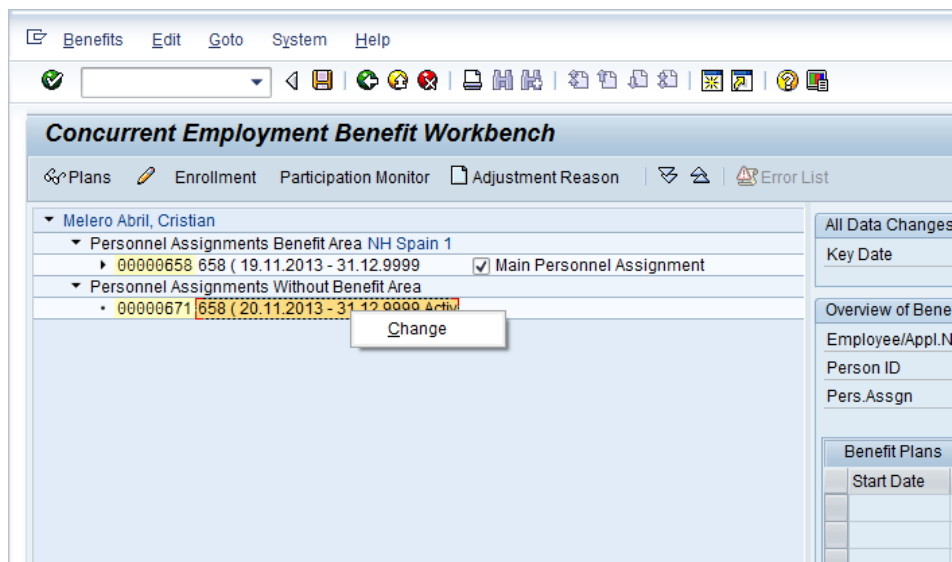


|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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We will see the screen with the two assignments the employee will have, and the benefits area for each of them. In the first one, the benefits area is “NH Spain 1”, and the second one does not have any assigned by default.

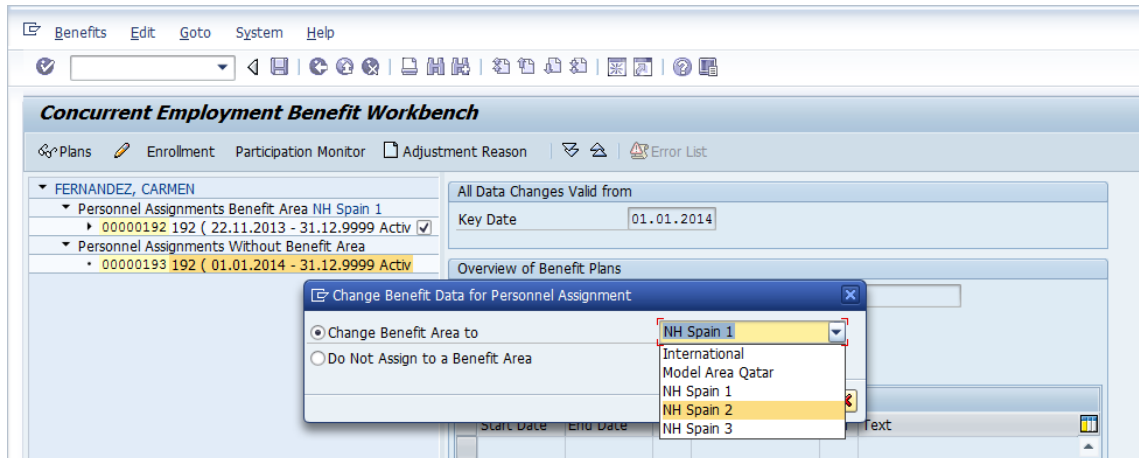


Clicking on it with the mouse right button, we will view the option *change*, and selecting it, a new window will appear, allowing to select other benefits area for the assignment.



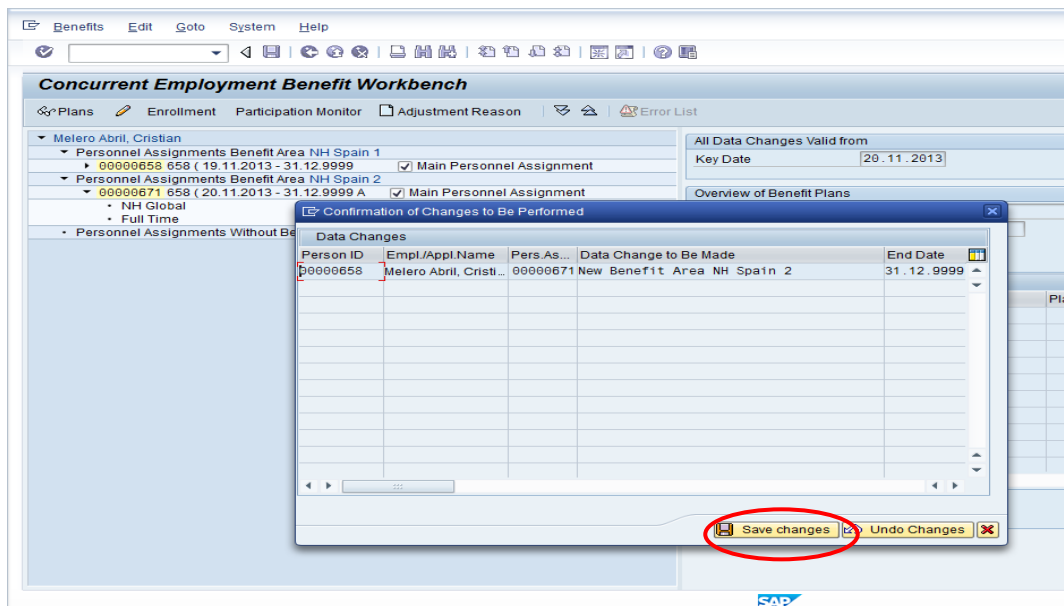


|  |  |  |                  |    |          |    |
|--|--|--|------------------|----|----------|----|
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In this case, we will choose the area “NH Spain 2”, so that both assignments have different benefits areas.

Then the change will be saved, and a window for changes confirmation will be opened.

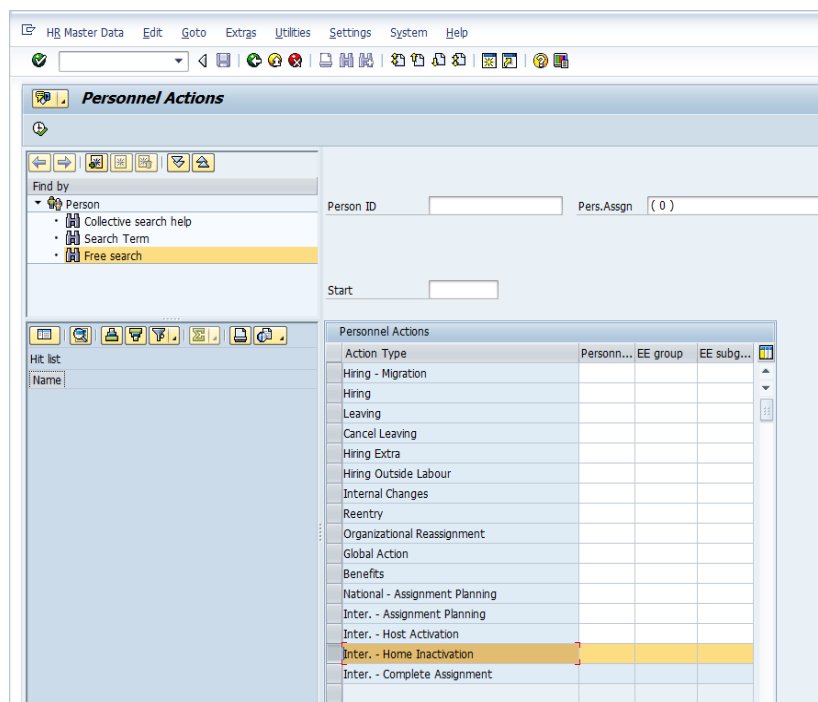


Once the assignment is finished, we should go back to continue creating the benefits.

To do so, we select the icon , and the intotype 0167 HEALTH PLAN will be displayed, where we may report the corresponding benefits. Once saved, we will access the intotype 0377 MISCELLANEOUS, to continue reporting the rest of the necessary benefits.

|   |  |  |  |  |                  |    |          |    |
|---|--|--|--|--|------------------|----|----------|----|
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Once we have finished the transaction INTER. – HOST ACTIVATION, we should manage the option **HOME INACTIVATION** from the PA40, in case we want to leave vacant the position occupied by the employee in the home country.



Once setting it as free, the system will automatically report us the position 9999999, we click on save, and the status is automatically changed and the previous position is set as free.

If the position should be maintained as occupied, this transaction should not be carried out.

Finally, if we want to change any data reported in this new employee's international assignment, in the transaction PA40, we should select the option **MODIFICATION**, to be able to view all the infotypes and save the corresponding changes.

|   |  |  |  |  |                  |    |          |    |
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## 14. Good use

The correct personnel management and the quality of the data reported in the new system, is an essential aspect that should be guaranteed by the good use of the application. With this purpose, some essential aspects are detailed below, and should be taken into consideration in daily operations.

### 1) Data format:

- all characters will be written in capitals (except the field e-mail) and without accents. For individuals, the use of – and ‘ will be allowed.
- the Ñ will be replaced by N
- the characters Ä, Ö, Ü, ß will be replaced by AE, OE, UE, SS, respectively
- in the numeric fields (tax identification, telephone, fax, ...), no symbols or spacers of any kind will be used
- the dates will always be registered in the format: DD.MM.YYYY
- in the alphanumeric fields, will be registered with a separation and not including abbreviations of ordinals

### 2) Transactions and common errors:

- Once the transaction LEAVING is realized for an employee, it is not possible to apply Hiring, the correct would be to realize the transaction REENTRY for this employee.
- If when hiring an employee, we have not filled in all the infotypes due to an error, we should go to the transaction PA40, search that employee and execute the option of HIRING; we will be able to find him, as once the first infotype is saved (Action), the employee number appears.

On the initial screen (infotype 0000 Action) we fill in the necessary data; we will pass through different infotypes, saving all of them.

In we have made a mistake in the hiring date, we may modify it in the PA30 transaction, by clicking on the option *utilities / change entry or leaving date*.