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Mastering HR Management with SAP

 PRESS

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Contents

Invitation	13
1 Goal of this Book	15
1.1 Scope of the Content	15
1.2 Target Group	16
1.3 Working with this Book	17
2 Overview of mySAP ERP HCM	19
2.1 HR or HCM as a Part of the SAP Solutions Family	19
2.2 The Elements of mySAP ERP HCM and SAP R/3 HR	22
3 mySAP HR in the Project	27
3.1 Structure of a mySAP HR Project	27
3.1.1 Project Scope	27
3.1.2 Project Phases	29
3.2 Tools	33
3.2.1 The Solution Manager	33
3.2.2 Process Modeling	34
3.2.3 Implementation Guide	37
3.3 Critical Success Factors	37
4 Personnel Administration	39
4.1 Business Principles	39
4.1.1 Organizational Structures in the Personnel Area	39
4.1.2 HR Master Data and Work Processes	41
4.1.3 Legal Principles	43
4.1.4 A Basis for Other Personnel Management Processes	43
4.1.5 Companywide Integration of HR Data	46
4.2 The mySAP HR Concept	48
4.2.1 Personnel Numbers	49
4.2.2 The Infotype Concept	54

4.2.3	Data Maintenance in Infotypes	57
4.2.4	System Adjustments in Master-Data Maintenance	66
4.2.5	Structures in Personnel Administration	78
4.2.6	Organizational Management	86
4.3	Selected Infotypes for Personnel Administration	86
4.3.1	Actions (0000)	86
4.3.2	Organizational Assignment (0001)	86
4.3.3	Personal Data (0002)	91
4.3.4	Address (0006)	93
4.3.5	Basic Pay (0008)	94
4.3.6	Monitoring of Tasks (0019)	96
4.3.7	Cost Distribution (0027)	98
4.3.8	External Transfers (0011)	99
4.3.9	Education	100
4.3.10	Additional Personal Data (Infotype 0077)	102
4.3.11	Residence Status (Infotype 0094)	103
4.3.12	Infotypes for U.S. Employee Tax Information	104
4.4	Procedures in Personnel Administration	104
4.4.1	Personnel Actions	105
4.4.2	Dynamic Actions	116
4.4.3	Business Workflow in HR	121
4.5	Process Examples	124
4.5.1	Hiring an Employee	124
4.5.2	Decentralized Use of Personnel Data	127
4.5.3	Managing Expatriates	135
4.6	Critical Success Factors	139

5 Organizational Management in mySAP HR 141

5.1	Classification in the Overall System and in HR	141
5.1.1	Importance for Personnel Administration	141
5.1.2	Importance for Personnel Planning and Development	142
5.1.3	Importance for the Decentralized Use of HR	142
5.1.4	Importance for R/3 in General	142
5.2	Structure of Organizational Management	143
5.2.1	Designing the Organizational Structure	148
5.2.2	Integration with Personnel Administration	151

6 Recruitment 153

6.1	Business Principles	153
6.1.1	Goals of the Recruitment Process	153
6.1.2	Recruitment Media	153
6.1.3	Managing the Application Process	156
6.1.4	Applicant Selection	159
6.1.5	Recruitment Controlling	160
6.1.6	Internet Recruiting	161

6.2	The mySAP HR Concept	162
6.2.1	Integration in the Organizational Structure	162
6.2.2	Media and Instruments	164
6.2.3	Applicant Master Data	167
6.2.4	Status, Actions, Processes	174
6.2.5	Controlling the Work Flow and Correspondence	182
6.2.6	Controlling	189
6.2.7	Integration with the Internet	190
6.3	Process Examples	191
6.3.1	Advertisement	193
6.3.2	Receipt of Application	193
6.3.3	Single-Level Selection Process	195
6.3.4	Contract Creation	197
6.4	Critical Success Factors	197

7 E-Recruiting 199

7.1	Business Principles	199
7.1.1	War for Talent	199
7.1.2	Sourcing and Retention	199
7.1.3	Controlling Recruitment Processes	200
7.1.4	Processes and Organization	201
7.1.5	Recruitment Service Providing	201
7.1.6	Technology	202
7.2	The Process in mySAP ERP HCM	202
7.2.1	Overview	202
7.2.2	Process and Roles	204
7.2.3	Requisitions	206
7.2.4	Process Templates	210
7.2.5	Questionnaires	212
7.2.6	Further Important Terms	218
7.3	Looking at the Different Roles in E-Recruiting	219
7.3.1	The External Candidate	220
7.3.2	The Internal Candidate	231
7.3.3	The Manager	232
7.3.4	The Recruiter	233
7.3.5	The Administrator	239
7.3.6	Succession Planner	239
7.4	Customizing and Technology	240
7.4.1	Technical Settings	240
7.4.2	Basic Settings	241
7.4.3	Talent Warehouse	241
7.4.4	Applicant Tracking	242
7.4.5	Activities	243
7.4.6	Questionnaires	245
7.4.7	Requisition Management	246
7.4.8	Further Technical Issues	246
7.5	Critical Success Factors	247

8 Time Management 249

8.1 Business Principles	249
8.1.1 Objectives of Time Management	249
8.1.2 Forms of Time Recording	252
8.1.3 Legal Principles	253
8.1.4 Concepts of Flexible Working Hours Policy	253
8.2 Design in the SAP System	255
8.2.1 Structures in Time Management	256
8.2.2 Public-Holiday Calendar	257
8.2.3 Concepts Explanations for Time Management	258
8.2.4 Work Schedules	263
8.2.5 Time Data Entry	271
8.2.6 Connecting Time Clocks	298
8.2.7 Time Evaluation	303
8.2.8 Incentive Wage	311
8.2.9 Reporting in Time Management	317
8.2.10 Integration Aspects	319
8.3 Time Manager's Workpace	320
8.3.1 Application and Functionalities	320
8.3.2 Customizing for the TMW	325
8.3.3 Amended Delivery in R/3 Enterprise	335
8.4 Calendar View in the TMW	335
8.4.1 Calendar Types	336
8.4.2 Functional Span	336
8.4.3 Processing Time Data	337
8.4.4 Customizing	338
8.5 The Mobile Solutions of Time Management	342
8.5.1 Types of Web Applications and Mobile Applications	343
8.5.2 CATS Notebook	343
8.5.3 WAP Applications of Time Management	345
8.5.4 Conclusion	347
8.6 Process Examples	347
8.6.1 Flextime Model with Traffic Lights	347
8.6.2 Part-Time Model	351
8.6.3 Time-Autonomous Work Groups	353
8.6.4 Life-Working-Time Accounts	355
8.7 Critical Success Factors in Time Management	359

9 Payroll 361

9.1 Business Principles	361
9.1.1 Basic Forms of Remuneration	361
9.1.2 Influencing Variables of Gross Payroll	362
9.1.3 Net Payroll	364

9.2	Payroll Conception in mySAP HR	364
9.2.1	Structures for Remuneration Calculation	365
9.2.2	Payroll Principles	366
9.2.3	Payroll Process	379
9.2.4	HR Process Workbench	400
9.2.5	The Payroll Calculation	403
9.3	Process Examples	419
9.3.1	Off-Cycle Workbench	419
9.3.2	Samples for Personnel Calculation Rules	424
9.4	Critical Success Factors	430

10 Benefits 431

10.1	Business Principles	431
10.2	Implementation in SAP HR	432
10.2.1	Basic Conceptions	432
10.2.2	Benefit Plans	435
10.2.3	Master Data	439
10.2.4	Enrollment	442
10.2.5	Miscellaneous	446
10.2.6	U.S. Specific Benefits	452
10.3	Critical Success Factors	456

11 Personnel Controlling 457

11.1	Business Principles	457
11.1.1	Categorization of Personnel Reports	457
11.1.2	Requirements for Setting Up Reporting	459
11.1.3	Timeline for Reporting Data	460
11.1.4	Counting Method	462
11.1.5	Special Case for Turnover Statistics	463
11.2	Implementation in mySAP HR	464
11.2.1	Structures in Personnel Controlling	464
11.2.2	Tools for Personnel Controlling	466
11.2.3	Standard Reports	470
11.2.4	SAP Query	477
11.2.5	Ad-Hoc Query	481
11.2.6	Enhancing the Query Options	486
11.2.7	Programming Customer-Specific Reports	489
11.2.8	HIS	490
11.2.9	Limits of HR Reporting	492
11.2.10	Business Information Warehouse	494
11.3	Process Example: Company-Specific Reporting Concept	496
11.4	Critical Success Factors	499

12 Quality Assurance 501

12.1	Quality in Software Projects	501
12.2	Cross-Process Quality Aspects in HR	503
12.2.1	Structured Procedure	503
12.2.2	Documentation and Customizing	504
12.2.3	Clear Customizing	505
12.2.4	Test Concept	506
12.2.5	Authorization Concept	508
12.2.6	Decentralized Use of the System	510
12.2.7	Setting Up Your Quality-Management Project	511
12.2.8	Auditing Tools	513
12.3	Process-Specific Quality Aspects in HR	515
12.3.1	Quality Assurance in Organizational Management	515
12.3.2	Quality Assurance in Recruitment	516
12.3.3	Quality Assurance in Personnel Administration	517
12.3.4	Quality Assurance in Time Management	519
12.3.5	Quality Assurance in Remuneration Payroll	524
12.3.6	Quality Assurance in Personnel Controlling	525
12.4	Critical Success Factors	526

13 Role-Based Portal Solution 527

13.1	Roles in mySAP HR	527
13.1.1	General Remarks	527
13.1.2	Selected Roles in mySAP HR	530
13.2	mySAP Employee Self Service	531
13.2.1	The Internet Transaction Server (ITS)	532
13.2.2	ESS Time Management	536
13.2.3	ESS Remuneration Statement	542
13.2.4	ESS Personnel Administration	543
13.3	mySAP Manager's Desktop	544
13.3.1	The User Interface	545
13.3.2	Adjustment Options	546
13.4	ESS and MSS in the Portal	554
13.4.1	Overview	554
13.4.2	The mySAP Enterprise Portal	555
13.4.3	Portal-Based ESS	558
13.4.4	Portal-Based MSS	564
13.4.5	Process Example	571
13.5	Critical Success Factors	576
13.5.1	Success Factors: mySAP HR Roles	576
13.5.2	Success Factors: ESS and MDT	577
13.5.3	Success Factors: mySAP Enterprise Portal, ESS and MSS in the Portal	579

14	Integration with Personnel Planning	581
14.1	General Remarks on Integration	581
14.2	Organizational Management	582
14.3	Training and Event Management	582
14.4	Personnel Development and Performance Management	582
14.5	Compensation Management/Cost Planning	582
14.6	Workforce Planning/Shift Planning	583
14.7	Cross-Component Aspects	583
A	Cross-Process Customizing Tools	585
B	HR Infotypes	591
C	Explanations for Process Models	613
D	Recommended Reading	617
E	About the Authors	619
	Index	623

5 Organizational Management in mySAP HR

Organizational management is a very powerful and flexible component. It not only describes the basis for the personnel planning and development processes, but is also required for optimal implementation of personnel administration, and in particular for personnel controlling. In addition, it offers extensive options for defining and evaluating structures.

5.1 Classification in the Overall System and in HR

5.1.1 Importance for Personnel Administration

Organizational management is actually assigned to the planning components of HR, which are not part of the subject-matter of this book. However, because it represents a utility for structuring even without the use of personnel planning and development, it should be mentioned here. Use of organizational management when using personnel administration is definitely advisable as a basis for structuring and evaluation. In addition, the component serves as an essential basis for evaluations in all other processes and is of particular importance for recruitment. In this context, the complete functional scope is not required. It will suffice to discuss a pragmatic implementation using the following objects, which will be described in more detail in the course of the book.

- ▶ Organizational units and their integration in the organizational structure
- ▶ Positions, their integration in the organizational structure and the assignment of owners
- ▶ Jobs as a means to describe and classify positions

Organizational management is of particular importance in the mySAP HR authorization check. By activating the structural authorization check, it is possible to assign authorizations based on the organizational structure. We will only introduce organizational management in general terms in this chapter. You will find a detailed description in the book "HR Personnel Planning and Development Using SAP" from the same team of authors, also published by SAP PRESS.

5.1.2 Importance for Personnel Planning and Development

The object types mentioned above are an indispensable basis for the personnel planning and development processes. Only event management would be able to function without organizational management, but even it would be extremely limited in terms of carrying out evaluations.

For the remaining processes of personnel planning and development, the basic objects of positions, jobs, and—frequently—organizational units are further characterized with regard to the following attributes:

- ▶ Requirement profiles
- ▶ Career paths
- ▶ Development plans
- ▶ Employee goals
- ▶ Appraisal models
- ▶ Planned costs
- ▶ Requirements
- ▶ Budgets
- ▶ Compensation

5.1.3 Importance for the Decentralized Use of HR

Specific interfaces for decentralized use also require the clean maintenance of the organizational structure in many cases:

- ▶ The MDT (Manager's Desktop) or the MSS (Manager's Self Service) cannot be used without organizational management.
- ▶ In TMW (Time Manager's Workplace), organizational management can also be used for selecting the employees to be processed. There are other ways of doing this, however.

5.1.4 Importance for R/3 in General

Organizational management is a basis for the following cross-process functionalities:

- ▶ SAP Business Workflow
- ▶ Assigning roles to users
- ▶ Cross-module company organization along with controlling

5.2 Structure of Organizational Management

The Concept of the Plan Version

A plan version describes a specific world from the personnel planning and development view. Different plan versions are specifically used in order to run through alternative planning scenarios. Therefore it is possible to copy plan versions.

The active plan version or integration plan version has a special status. It is only set once during the initial implementation (mostly to 01) and must not be changed after that. The integration plan version is the only plan version whose changes impact the active integration of personnel administration.

Integration plan
version

In order to change the plan version currently displayed or processed, you can use the menu path **Personnel · Organizational management · Settings · Set plan version** (see Figure 5.1).

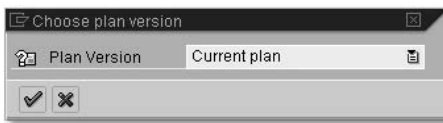


Figure 5.1 Selecting the Plan Version

Objects, Relationships, Infotypes

While in personnel administration the "person" represents merely a type of information object, in organizational management different object types are processed. These are, for instance:

- ▶ Organizational unit
- ▶ Position
- ▶ Job
- ▶ Task

In addition external object types are also addressed. These represent objects that do not belong to organizational management and are not saved in its object structure, but that are quite important for organizational management. These are, in particular:

- ▶ Person from personnel administration
- ▶ Applicants from recruiting
- ▶ Cost center from cost accounting

In order to create relationships between these objects, relationship types are used. Each relationship possesses specific semantics such as:

- ▶ "Belongs to/Incorporates" (between organizational unit and position)
- ▶ "Holder" (between position and person)
- ▶ "Manages/is managed by" (between position and organizational unit)

This means different structures can be based on objects and relationships.

Infotypes are used in order to further describe objects beyond their structure relationship in the same way as in personnel administration. The infotype concept is very similar to that used in administration, even though the technical implementation deviates in some respects. In particular, not all infotypes are permitted for all object types here. Thus, for instance the Infotype "Vacancy" exists for a position, but not for an organizational unit.

The concept of objects, relationships and infotypes described here also applies to the other processes of personnel planning and development. Here, in particular, object types of different processes (e.g., organizational units and events) can be related to each other. The same infotype can also be used for objects of different processes. The number range for infotypes in personnel planning and development ranges between 1000 and 1999.

Customizing for objects, infotypes, and relationships is carried out via IMG path **Personnel management · Organizational management · Basic settings Enhancement · Data modeling**. For our present purpose, i.e., to use organizational management in a simple form as a basis for personnel administration and personnel controlling, no settings are required there.

Selected Object Types

Organizational unit

Basically, an organizational unit is an object of the organizational structure that has not been further specified. It can represent a business area, a team, an authority, a plant, or a department, among other things. This very general definition enables you to map as far into the depth of an organizational hierarchy as you want by using superordinate and subordinate organizational units.

Position

In simple terms, a position is a place that a specific employee can occupy. A position can also be vacant, which means for recruitment that personnel are required and an employee should be searched for. Positions are assigned to an organizational unit by the relationship type "belongs to."

The chief position has specific characteristics. The owner of this position manages the corresponding organizational unit. From a technical point of view, a chief position emerges when a link of the type "manages" is created between a position and an organizational unit. The chief position is important in many areas. For example, it can be used in order to assign specific tasks in Workflow, to identify the manager for the Manager's Desktop (see Section 13.3), or to grant access rights to subordinate employees via the structural authorization check.

A job can be regarded as a prototype or template for a position. While for instance, "loan officers" usually describes a job, "loan officer no. 3 in the commercial real estate department" is a position. In general, jobs and positions are named in the same way. In the example, the position would therefore also be called "loan officer." However, you can ascertain which position is meant from the hierarchical classification in the organizational structure. Jobs and positions are linked via the relationship types "describes" or "is described by." Thus the job concept provides a structure for the positions which can also be used for evaluation purposes.

Selected Infotypes

In many maintenance interfaces, the individual infotypes rarely appear. They are rather integrated in cross-application interfaces in order to align the process of the daily maintenance work with the tasks of a user role. You can reach the maintenance for individual infotypes through the menu path **Personnel • Organizational management • Expert mode**. Maintenance screens are provided there for organizational units, jobs, and positions for infotypes (see Figure 5.2). Under the menu item **General**, you can maintain infotypes for any objects.

The Infotype "Object" represents the object itself. It contains a name and an abbreviation, which may change over time. An object can be clearly identified using an eight-digit object ID. Infotype 1000 is thus comparable to Infotype 0002 in personnel administration. The name and abbreviation correspond to the name of an employee and the object ID of the personnel number. Figure 5.3 shows Infoype 1000.

**Object
(Infotype 1000)**

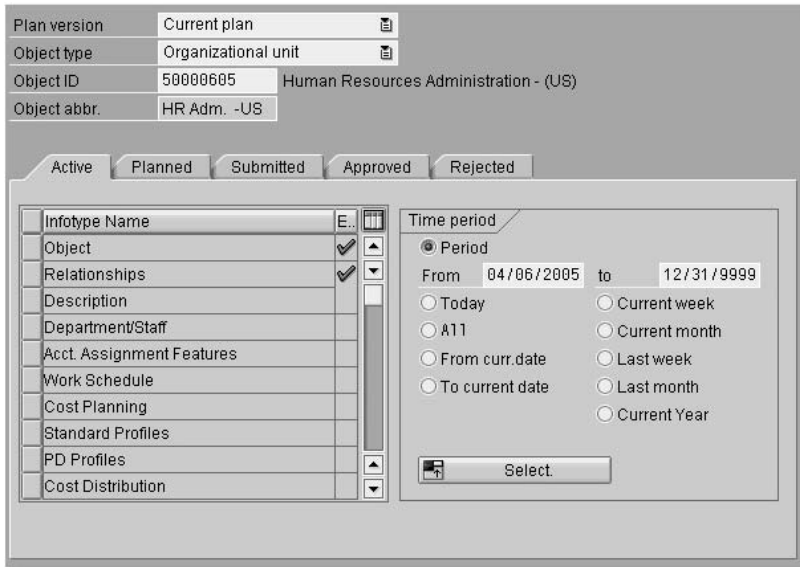


Figure 5.2 Expert Mode Independent of Object Types



Figure 5.3 Infotype 1000 (Object)

Relationship (Infotype 1001)

Relationships are also stored in an infotype where the relationship type represents the subtype. Direct maintenance of Infotype 1001, however, is an exception. The integrated maintenance interfaces enable reassignments, relationships, and simultaneous regeneration with relationships, without the direct maintenance of Infotype 1001. The infotype contains the relationship type and the related object (see Figure 5.4).

Organizational unit	HR Adm. -US	Human Resources Administration - (US)
Planning Status	Active	
Valid from	07/01/2001	to 12/31/9999 <input type="button" value="Change Information"/>
Relationships		
Relationship type/relationship	B 003 Incorporates	
Related Object		
Type of related object	Position <input type="button" value="Change Information"/>	
ID of related object	50000208	
Abbreviation	Adm. Staff -US	
Name	Administrative Staff (US)	
Priority	4	
Record 4 of 12		

Figure 5.4 Relating the Organizational Unit to the Position

When a relationship is created, the corresponding relationship is also automatically created in the opposite direction. Thus, if the relationship "Position belongs to organizational unit" is created, the system automatically also creates "Organizational unit comprises position." Figure 5.5 shows the inverse relationship that corresponds to Figure 5.4.

Position	Adm.Staff-US	Administrative Staff (US)
Planning Status	Active	
Valid from	07/01/2001	to 12/31/9999 <input type="button" value="Change Information"/>
Relationships		
Relationship type/relationship	A 003 Belongs to	
Related Object		
Type of related object	Organizational unit <input type="button" value="Change Information"/>	
ID of related object	50000605	
Abbreviation	HR Adm. -US	
Name	Human Resources Administration - (US)	
Priority	4	
Record 1 of 3		

Figure 5.5 Relating the Position to the Organizational Unit

Infotype "Department/staff" enables you to identify an organizational unit as a staff unit. This can be evaluated and displayed in a graphic. In addition, these department IDs can also be used to distinguish real departments from groups. This affects both evaluations and the integra-

**Department/staff
(Infotype 1003)**

tion with personnel administration (see Section 5.2.2). Figure 5.6 illustrates an example of Infotype 1003.

Organizational unit	HR Adm. -US	Human Resources Administration - (US)	
Planning Status	Active		
Valid from	04/06/2005	to	12/31/9999
Change Information			
Department/Staff			
<input type="checkbox"/> Staff			
<input checked="" type="checkbox"/> Department			

Figure 5.6 Department Identifier and Staff Identifier in Infotype 1003

Vacancy (Infotype 1007)

Information on the vacancy is an essential element of manpower-requirement planning and recruitment. In order to be able to really support requirement planning, the vacancy should be created as soon as the departure or transfer of an employee becomes known. This generally occurs automatically in the action "Organizational change" or "Leaving."

Position	Adm.Staff-US	Administrative Staff (US)	
Planning Status	Active		
Valid from	04/06/2005	to	12/31/9999
Change Information			
Vacancy			
<input checked="" type="radio"/> Open			
<input type="radio"/> Vacancy filled			
<input type="checkbox"/> Historical rec.			

Figure 5.7 Infotype 1007 (Vacancy)

The infotype itself contains a status indication for the vacancy (see Figure 5.7). **Open** means that the search for personnel can begin immediately, while **Vacancy filled** doesn't require any immediate action.

5.2.1 Designing the Organizational Structure

The organizational structure is initially created via the menu path **Personnel • Organizational management • Organizational structure • Organization and staff assignment • Create**, in order to publish the root of the structure. You then can carry out further maintenance through the path **Personnel • Organizational management • Organizational structure • Organization and staff assignment • Change**.

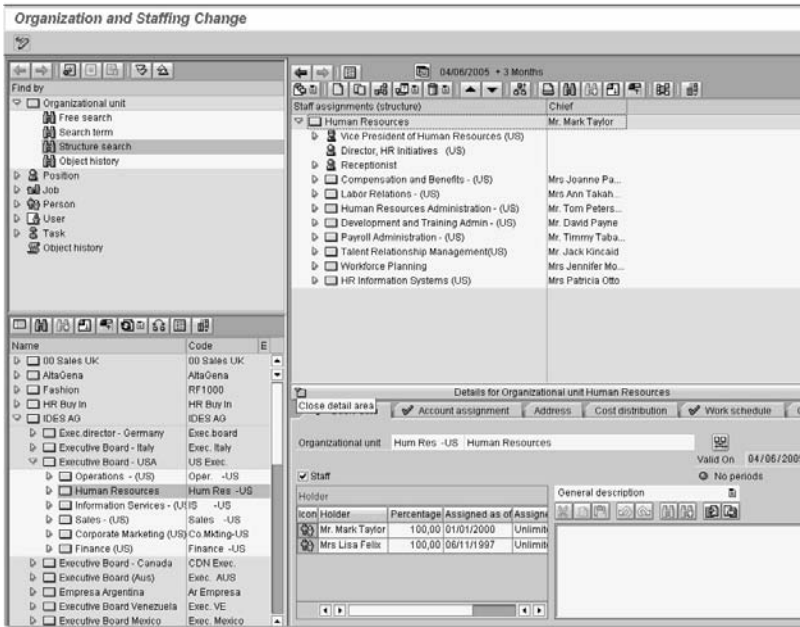


Figure 5.8 Maintenance Interface Divided into Four Parts

To a large extent, the integrated maintenance interface abstracts from the infotypes, and is divided into four areas (see Figure 5.8). Due to the split-screen technology, the four areas can be enlarged or reduced using the mouse, as is required for the current activity.

The upper left-hand pane is used to select objects and works like the Object Manager in personnel administration (see Figure 5.9).

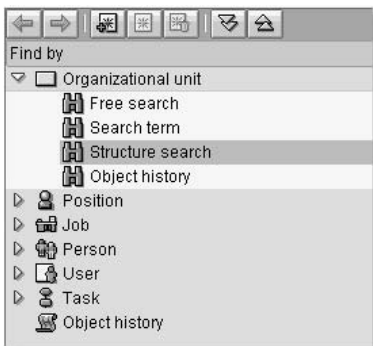


Figure 5.9 Selecting Objects

The lower left-hand pane manages the pool of objects already selected (see Figure 5.10). These can be selected as root objects for the work area or can be assigned to objects of the work area by Drag&Drop.

The actual work area is located in the upper right-hand pane. There you can use the **Goto** button to change between different views. In particular you can change between the pure organizational structure and the staff assignments (see Figure 5.11).

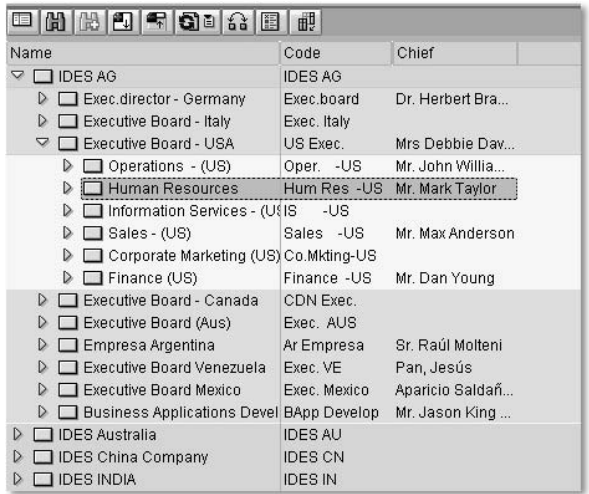


Figure 5.10 Object Pool

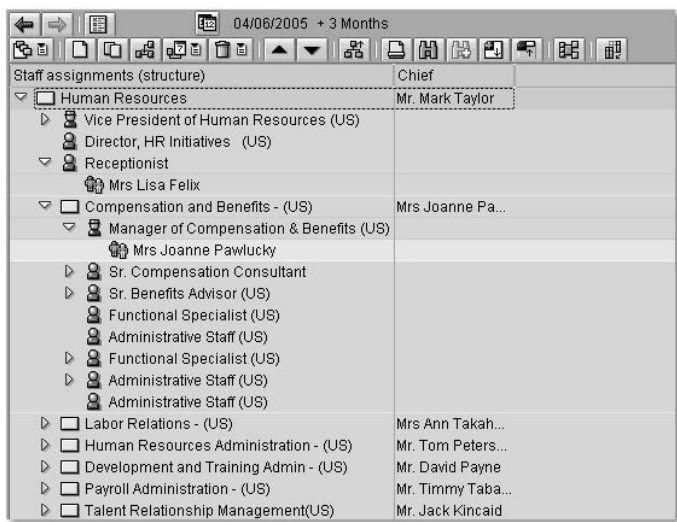


Figure 5.11 Staff Assignments in the Work Area

The following functionalities are available here:

- ▶ Creating, reassigning, delimiting, and deleting organizational units
- ▶ Creating, reassigning, delimiting, and deleting positions
- ▶ Changing the display sequence
- ▶ Assigning cost centers
- ▶ Assigning management functions
- ▶ Selecting objects for the details area

If you selected an object for the details area by double-clicking on it, different maintenance functions are available in several tabs (see Figure 5.12). Which tabs are available depends on the object type and the customizing settings.

This configuration of the entire maintenance screen occurs via the IMG path **Personnel management • Organizational management • Hierarchy framework**.

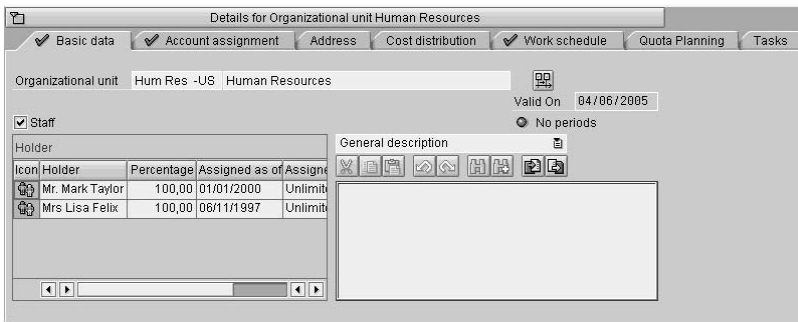


Figure 5.12 Maintenance via Tabs

5.2.2 Integration with Personnel Administration

The functionalities described so far are sufficient for supporting personnel administration and personnel controlling. The functionality of the integration is described in more detail in Chapter 4, *Personnel Administration*, in correlation with Infotype 0001. Nevertheless here are some important remarks on integration:

- ▶ The teams which maintain the organizational management and personnel administration in the system must be completely aware of the integration aspects, as well as their effects on the work of their colleagues.

- ▶ Note that retroactive organizational changes trigger recalculations in remuneration payroll that may lead to extensive adjustments in cost accounting.
- ▶ You should also pay particular attention to the integration with recruitment and manpower requirement planning. These are based on the following prerequisites:
 - ▶ Vacancies must be maintained in a timely and correct manner.
 - ▶ Vacant positions must be delimited if they are definitely no longer required.
 - ▶ Positions for new employees must be created and correspondingly named.
- ▶ For a simple implementation of organizational management, as we seek to enable in this book, no customizing settings are required at first except for the definition of the integration itself via the characteristic PLOGI and the entries in the system table T7750 for the group PLOGI.