Human Capital Management (HCM I) Case Study

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

**MOTIVATION**

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

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

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

**PREREQUISITES**

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

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

**NOTES**

This case study uses the Global Bike data set, which has been created exclusively for SAP UA global curricula.
Learning Objective Understand and perform a Human Resource process.

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

Employees involved
Marco Romero (Recruiting Officer)
Sang Cha (Personnel Administration Officer)

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

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

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

**Name (Position)** Marco Romero (Recruiting Officer)

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

To create a position, follow the menu path:

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

Change the previewed periods to be able to create positions which are valid for the past. Therefore, please click and enter 1st of the last month as start date. Also enter one year in the future as Preview period.

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

Please choose your organizational unit via double-clicking so that it appears on the right side of the screen. Highlight your organizational unit and click on Incorporates in the context menu. In the upcoming screen Choose Relationship, please choose Incorporates.
A new position was created underneath your Security department. On the bottom of the screen, the details for the new position are displayed. There, please enter the abbreviation CSM for the position and Chief Security Manager as the name. Please activate the check box Head of own organizational unit.

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

Press enter to update the entered information. The organizational structure should now look as follows.

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

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

For the third position, please choose ### SM as abbreviation and as name ### Security Manager. Press enter to update the information. Your structure should now look like the following picture.

Save your changes and click on the exit icon to return to the SAP Easy Access screen.
Step 2: Create Career

**Task** Create a career for an employee.

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

To create a career, follow the menu path.

**Menu path**

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

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

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

The first station of the career is supposed to be a position. To create the position, please click on the *position* field in the **Node Area** on the bottom right side of the screen and afterwards please click in the **Display Area** on the left side of the screen. If the structure search opens in the Choose Position screen, click on ☐️ and choose Search Term.
Otherwise you already are in the *Restrict Value Range* screen. Enter the search term ###*.

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

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

**000 Security Guard**

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

![Diagram](#)

**000 Security Guard**

000 Chief Security Manager

000 Security Manager

Double-click on the position you just inserted and enter duration of **5 years**.

![Maintain Duration](#)

Finally, insert another position and choose **Security Guard** from the Structure Search. Enter duration of **3 years**. The network of the career should look as follows:
Please save, close the graphical editor and click on the exit icon to return to the SAP Easy Access screen.
Step 3: Define Requirements

**Task** Define requirements for positions.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to define necessary qualifications/requirements for positions.

**Name (Position)** Marco Romero (Recruiting Officer)

In order to define the requirements for a position, follow the menu path:

**Menu path**

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

In the screen *Find by*, expand Position 🏛 Position and click on **Search Term**.

In the now appearing search screen, please enter ###* into the field *With name* in order to find your positions.

Afterwards, click on ✅ Find.

In the lower part of the screen, the results are displayed within the **Hit List**.

Please choose your position (**### Security Manager**) via double click.

A list of requirements is displayed in the right part of the screen. Click on ⌨️ in order to define further requirements for the position.

Change to the tab **Abbreviation and Name**. Do not change the Object Abbreviation (*), so that all possible qualifications will be displayed and make sure the Language Key is set to EN. Press Enter to confirm your search.
Please choose **First Aid Certification** and **GIAC Security Leadership Certification** by selecting the individual qualifications. Press ✔️ to confirm your selection.

For both entries, please type in **Yes** in the **Proficiency** column since these qualifications imply certificates which employees may receive without gradation. Label both requirements as **Ess** by placing a checkmark within the particular qualifications and choose the **1st of the last month** as the beginning.

Please save your data with 

Click ✔️ in order to return to the SAP Easy Access Menu.
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Step 4: Hire Employee

Task: Hire an employee for the new position.

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

Name (Position): Marco Romero (Recruiting Officer)

Time: 15 min

To hire the employee, follow the menu path:

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

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

In the Create Actions screen, find the position ##Chief Security Manager## with the F4 help. Then, press Enter to continue.
Please save your data. You will automatically be taken to the next infotype. Write down the Personnel Number of your employee, stated at the top of the screen in the field Personnel No.

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

![Create Personal Data Screen]

Then, save your data. You will automatically be taken to the next infotype.

In the *Organizational Assignment* infotype, define EX00 as subarea. Save the data and choose YES to confirm the selection of your position’s vacancy.

![Delimit Vacancy]

Save the infotype *Travel Privileges* without any changes.
In the next window, choose **Permanent residence** as the subtype for the infotype Addresses and continue with ✅.

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

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

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

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

Click on the exit icon ✅ to return to the SAP Easy Access screen.
Step 5: Display Organizational Plan

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

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

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

**Menu path**

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

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

<table>
<thead>
<tr>
<th>Staff assignments (structure)</th>
<th>Code</th>
<th>ID</th>
<th>Chief</th>
</tr>
</thead>
<tbody>
<tr>
<td>000 Security</td>
<td>000 Security</td>
<td>500000025</td>
<td>Mr Marcus Miller</td>
</tr>
<tr>
<td>- 000 Chief Security M</td>
<td>000 CSM</td>
<td>S 50002151</td>
<td></td>
</tr>
<tr>
<td>• 000 Mr Marcus Miller</td>
<td></td>
<td>P 00000070</td>
<td></td>
</tr>
<tr>
<td>• 000 Security Guard</td>
<td>000 SG</td>
<td>S 50002152</td>
<td></td>
</tr>
<tr>
<td>• 000 Security Manage</td>
<td>000 SM</td>
<td>S 50002153</td>
<td></td>
</tr>
</tbody>
</table>

Click on the exit icon 🔄 to return to the SAP Easy Access screen.
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Step 6: Post Job Advertisement

**Task** Post a job advertisement.

**Short Description** Use the SAP Easy Access Menu to post a job advertisement.

**Name (Position)** Marco Romero (Recruiting Officer)

To post a job advertisement, follow the menu path:

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

In the upcoming screen *Postings*, please click ![Advert](image) in order to view all existing advertisements. In the screen *Maintain Advertisements*, choose ![Advert](image) to create a new advertisement. Assign a new Advertisement Number by clicking on ![Advert](image). As Recruitment Instrument the company has chosen the **Dallas Observer** and the advertisement has been published on **1st of the last month**. The advertisement end is planned for the **1st of the following month** and the publication costs amount **10,000 USD**. Enter Advertisement - ### Security Guard as the Text name, replacing ### by your group/computer number.

**Create Posting**

<table>
<thead>
<tr>
<th>Advertisement</th>
<th>0000001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next free advertisement number</td>
<td><img src="image" alt="Advert" /></td>
</tr>
<tr>
<td>Publication</td>
<td><img src="image" alt="Advert" /></td>
</tr>
<tr>
<td>Instrument</td>
<td>0000101</td>
</tr>
<tr>
<td>Medium</td>
<td><img src="image" alt="Advert" /></td>
</tr>
<tr>
<td>Publication date</td>
<td>07/04/2016</td>
</tr>
<tr>
<td>Advertisement end</td>
<td>08/04/2016</td>
</tr>
<tr>
<td>Publication costs</td>
<td>10000 USD</td>
</tr>
<tr>
<td>Text name</td>
<td>Advertisement - 000 Security Guard</td>
</tr>
</tbody>
</table>

Afterwards, please choose ![Maintain text](image) to insert the text for the advertisement. Enter a text of your choice and save the text by clicking on ![Advert](image). With ![Advert](image) go back to the screen *Create Posting*. Choose ![Add](image) to add the vacant position to your advertisement. Therefore, choose ![Advert](image) and enter ###* in the field Find. Highlight your position and press ![Advert](image) in order to adopt the entry.
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Save your entries with and click on the exit icon to return to the SAP Easy Access screen.

<table>
<thead>
<tr>
<th>Vacancy</th>
<th>Position (Short Text)</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>50001077000</td>
<td>Security Guard</td>
<td>07/01/2013</td>
<td>12/31/99</td>
</tr>
<tr>
<td>50001078000</td>
<td>Security Manager</td>
<td>07/01/2013</td>
<td>12/31/99</td>
</tr>
</tbody>
</table>
Step 7: Enter Applicant Master Data

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

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

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

**Human Resources ► Personnel Management ► Recruitment ► Applicant Master Data ► Initial Data Entry**

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

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

In the area *Application*, please search for the previously created job advertisement *Advertisement - ### Security Guard* via F4 help. Save your data with ![checkmark].
In the *Create Addresses* infotype, enter optional data for **Street**. In the City field, enter **Dallas** and postal code **75201**, country **USA** and select **TX** as State. If necessary, use the F4 help. Save your data with ✎.

![Create Addresses](image)

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

Applicant number: ________________

Click on the exit icon 🚹 to return to the SAP Easy Access screen.
Step 8: Prepare Hiring

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

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

**Name (Position)** Marco Romero (Recruiting Officer)

**Time** 10 min

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

**Menu path**

Human Resources ► Personnel Management ► Recruitment ► Applicant Master Data ► Applicant Actions

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

![Applicant Actions screenshot](image)

Save the screen *Copy Applicant Actions* with all entered data and confirm the following warning message with Enter. Confirm the warning message saying that the planned operation lies in the future and close the screen *Create Planned Activity* with **✓**.
Click on the exit icon 🛑 to return to the SAP Easy Access screen.
Step 9: Hiring Applicant

Task Hire the applicant.  

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

Name (Position) Marco Romero (Recruiting Officer) 

To hire the applicant, follow the menu path.

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

Please enter the first of the last month as the begin date, leave the field Personnel No. empty and confirm with Enter. Choose the personnel action **Hire Applicant** and enter the personnel area DL00, Employee Group 1 and Employee Subgroup U4 in the fields next to the personnel action. Execute the personnel action by clicking on ![Action](https://example.com).

<table>
<thead>
<tr>
<th>Action Type</th>
<th>Personnel...</th>
<th>EE group</th>
<th>EE subg...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational reassignment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer (EDP) - active</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer (EDP) - retiree</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Early retirement/retirement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leaving</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reentry into company</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time recording (mini master)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time rec.,(supplement)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring (TE mini master)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Org. management (mini master)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time sheet (mini master)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Hire applicant</strong></td>
<td>DL00</td>
<td>1</td>
<td>U4</td>
</tr>
</tbody>
</table>

In the screen **Direct Data Transfer**, please enter the number of your applicant and click on ![Transfer](https://example.com).

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

Afterwards, please save ![Save](https://example.com) your data.
Write down the new personnel number.

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

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

You can save the screen *Create Addresses* without any changes. In the following screen *Tax Area*, please choose TX as tax area and press Enter.
Save the infotype Create Residence Tax Area as well as the following two infotypes without any changes. The status bar indicates that the record has been created. Afterwards save the three tax-views again and accept any data overrides.

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

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

Click on the exit icon ☐ to return to the SAP Easy Access screen.
Step 10: Proof Hiring

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

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

**Name (Position)** Chris Thomas (Human Resources Manager)

Time 5 min

To proof hiring, follow the menu path.

**Menu path**

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

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

<table>
<thead>
<tr>
<th>Staff assignments (structure)</th>
<th>Code</th>
<th>ID</th>
<th>Chief</th>
</tr>
</thead>
<tbody>
<tr>
<td>▼ Security</td>
<td>000</td>
<td>O 50000025</td>
<td>Mr Marcus Miller</td>
</tr>
<tr>
<td>▼ Chief Security M 000 CSM</td>
<td>S 50002151</td>
<td>P 00000070</td>
<td></td>
</tr>
<tr>
<td>• Mr Marcus Miller Miller</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Security Guard 000 SG</td>
<td>S 50002152</td>
<td>P 00000071</td>
<td></td>
</tr>
<tr>
<td>• Miss Sanna Meyer Meyer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Security Manager 000 SM</td>
<td>S 50002153</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Click on the exit icon to return to the SAP Easy Access screen.
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Step 11: Maintain Qualification Profile

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

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to maintain the employee’s qualification profile.

**Name (Position)** Sang Cha (Personnel Administration Officer)

To maintain the qualification profile, follow the menu path.

**Menu path**

- **Human Resources** ➤ **Personnel Management** ➤ **Personnel Development** ➤ **Profile** ➤ **Change**

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

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

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

Save your entries and click on the exit icon to return to the SAP Easy Access screen.
Step 12: Execute Career Planning

**Task** Execute the career planning.

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

To execute the career planning, follow the menu path.

**Menu path**

Human Resources ➤ Personnel Management ➤ Personnel Development ➤ Planning ➤ Career

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

The career planning displays for which positions the qualifications and potentials of the employee are suitable and which careers the employee may follow.
The screen *Career Planning* presents all positions which the employee could theoretically fill.

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

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

The employee shall be reserved for the position ### Security Manager as he or she shall follow the career for ### Security Guard. Therefore, please choose the target position and choose Planning ▶ Create ▶ Designation. It shall be valid from today on.
Click on the exit icon to return to the SAP Easy Access screen.
Step 13: Create an event

**Task** Create an event.  

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

To create the event, follow the menu path.

**Menu path**

**Dynamic Business Event Menu**

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

Change the Name of the event to *** ST and *** GBI Security Training. Choose the location **Dallas** in the F4-help. Afterwards, please enter 1 as the minimum number of attendees, as the optimum and as the maximum number of attendees and save your event.
In the upcoming screen *Create User Schedule*, please enter a duration of 3 days and 21 hours in total in the Without pattern tab. The training shall start on a Monday. Confirm your entries with ✔.

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

Click on the exit icon ↵ to return to the SAP Easy Access screen.
Step 14: Book the event

**Task** Book the event.

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

To book the event, follow the menu path.

1. **Menu path**
   - Human Resources ➤ Training and Event Management ➤ Attendance ➤ Attendance Menu

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

   ![Dynamic Attendance Menu]

   In the upcoming screen **Book Attendance: Data**, search for your employee, who is in charge of the **Security Guard** position, with the help of the F4-help in the field Person.
Now, please click on **Book/Payment Info** and choose the settlement type **Free of charge**. Close the window *Fee and Assignment* with [x] and go back to the Attendance Menu. There, you can see that your employee was booked for the event.

<table>
<thead>
<tr>
<th>GBI Security Training</th>
<th>50000250</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/27/2016 - 06/29/2015</td>
<td>EN/000 STE 50002159</td>
</tr>
<tr>
<td>Serina Meyer</td>
<td>00000071</td>
</tr>
</tbody>
</table>

Click on the exit icon [x] to return to the SAP Easy Access screen.
### Step 15: Follow up the event

**Task** Follow up the event.  
**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to follow up the event.

**Name (Position)** Sang Cha (Personnel Administration Officer)

**Menu path**

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

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

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

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

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

Save your entries by clicking on ![Save]( saved by clicking on ![Save](.) Return to the Business Event Menu.

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

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

Please save the follow up and click on the exit icon to return to the SAP Easy Access screen.
Step 16: Execute Career Planning

**Task** Execute the career planning.

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

To execute the career planning, follow the menu path.

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

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

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

This time, your employee meets all requirements.

Click on the exit icon 🕊 to return to the SAP Easy Access screen.
**Step 17: Prepare Appraisal**

**Task** Prepare an appraisal.

**Time** 5 min

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

---

To prepare the appraisal, follow the menu path.

**Menu path**

1. Human Resources ➤ Personnel Management ➤ Personnel Development ➤ Appraisal ➤ Create

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

---

**Generate 'To-Do' List**

<table>
<thead>
<tr>
<th>Individual appraisal</th>
<th>Individual Performance Appraisal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period appraised</td>
<td>07/05/2016 to 08/05/2016</td>
</tr>
</tbody>
</table>

- **Supervisor**
- **Employee**

To do list starting from

| Person          | 00000070 | Mr. Marcus Miller |

- **Anonymous appraiser**

---

**Employee**

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>A., A., A., Object ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miss Sohn Meyer</td>
<td>Person</td>
<td></td>
</tr>
<tr>
<td>Mr. Marcus Miller</td>
<td>Person</td>
<td>000000071</td>
</tr>
</tbody>
</table>

Press **Complete Preparation** to continue.

In the status bar, the message **Status was changed** should be displayed.

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

**Step 18: Perform Appraisal**

**Task** Perform an appraisal.

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

**Name (Position)** Sang Cha (Personnel Administration Officer)

To perform the appraisal, follow the menu path.

**Menu path**

Human Resources ➤ Personnel Management ➤ Personnel Development ➤ Appraisal ➤ Edit

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

The list in the upcoming screen should include your prepared appraisal. Please highlight the respective line and press **».** In the following screen *Individual Performance Appraisal*, you can see all goals, the employee shall reach.
In order to complete the individual performance appraisal, please fill the row **Ratings** with individual appraisals of your choice with a scale ranging from very good to unsatisfactory. Thereby, you act as the Chief Security Manager. Afterwards, please press **Complete**.

Click on the exit icon 🕵️‍♂️ to return to the SAP Easy Access screen.
**Step 19: Transfer of Employee**

**Task** Transfer your employee.

**Time** 5 min

**Short Description** Use the SAP Easy Access Menu to transfer your employee to the position of the Security Manager.

**Name (Position)** Chris Thomas (Human Resources Manager)

To transfer an employee, follow the menu path.

**Menu path**

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

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

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

This produces the screen *Person Assign*. Enter the **First of the actual month** as **Valid from 100%** as Staffing Percentage. Choose **Job Conversion** as Action. Select the position of the Security Guard to set dates for relationship. Compare your entries with the following screenshot and click on **✓**.
Set the vacancy for the position as Security Guard to the actual date. In addition you delimit the position as Security Manager to the first of the actual month. To do so confirm the upcoming dialog with a click on Yes.

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

<table>
<thead>
<tr>
<th>Staff assignments (structure)</th>
<th>Code</th>
<th>ID</th>
<th>Chief</th>
</tr>
</thead>
<tbody>
<tr>
<td>▼ ▼ 000 Security</td>
<td>000 Sec</td>
<td>D 50000025</td>
<td>Mr Marcus Miller</td>
</tr>
<tr>
<td>▶ ▼ 000 Chief Security Manager</td>
<td>000 CSM</td>
<td>S 50002151</td>
<td></td>
</tr>
<tr>
<td>▶ ▶ ▼ Mr Marcus Miller</td>
<td>Miller</td>
<td>P 00000070</td>
<td></td>
</tr>
<tr>
<td>▶ ▼ 000 Security Guard</td>
<td>000 SG</td>
<td>S 50002152</td>
<td></td>
</tr>
<tr>
<td>▶ ▼ 000 Security Manager</td>
<td>000 SM</td>
<td>S 50002153</td>
<td></td>
</tr>
<tr>
<td>▶ ▶ ▼ Miss Serina Meyer</td>
<td>Meyer</td>
<td>P 00000071</td>
<td></td>
</tr>
</tbody>
</table>

Press to save your changes and click on the exit icon to return to the SAP Easy Access screen.
**Learning Objective** Understand and perform an integrated recruitment process.

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

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

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

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