Background Information

This user guide is written by MWR team members who are familiar with how you do business, and is therefore a great tool for you to use as you get comfortable with the system.
The SAP Human Resources module allows Navy MWR to consolidate ALL personnel, benefits, and retirement data into one centralized database.

This guide will take you through the entire system, from logging on, to completing the most involved tasks.

Because SAP is a dynamic system, and you will be working with dynamic data, these documents are truly "works in progress" and as such will never be completely finished. As you in the field, as well as our headquarters' staff, discover new and better ways to accomplish a task or new reporting requirements arise based on these new tasks, the documentation will be corrected and additions and replacements to these manuals will be published.

Please accept this documentation as your own. Make notes regarding any errors, procedural mistakes and irregular results that appear based on the steps illustrated in this manual. Send your suggestions and corrections to the SAP help desk at the address located on the first page of this manual.

♦ Overview

The aim in the Human Resources component is to be able to process employee related data according to business requirements in an effective structure.

The Human Resources module uses a system of data grouped together called infotypes.

Infotypes mirror a quantity of connected data records; infotypes are identifiable through a four character numerical string [e.g. infotype Addresses (0006)] and a complete listing is included in this manual for you.

You can save the infotypes as time-dependent to enable a retroactive evaluation of employee data.

The infotypes appear as an entry screen for the user, through which you can maintain infotype records. Infotypes can be processed individually or in fast entry mode.

These are the infotypes that will be used in the MWR/VQ systems.

Infotype Number	Infotype Text Description
0000	Actions
0001	Organizational Assignment
0002	Personal Data
0004	Challenge
0006	Addresses
0007	Planned Working Time
0008	Basic Pay
0009	Bank Details
0013	Social Insurance Deductions
0014	Recurring Payments/Deds
0015	Additional Payments
0019	Monitoring of Dates
0021	Family/Related Person
0022	Education
0025	Appraisals
0034	Corporate Function
0035	Company Instructions
0040	Objects on Loan
0041	Date Specifications
0048	Residence Status
0077	Additional Personal Data
0094	Residence Status
0105	Communication
0167	Health Plans
0168	Insurance Plans
0169	Savings Plans
0170	Flexible Spending Accounts
0171	General Benefits Information
0172	FSA Claims
0207	Residence Tax Area
0208	Work Tax Area
0209	Unemployment State
0210	Withholding info W4/W5 US
0377	Miscellaneous Plans
0378	Adjustment Reasons
9001	DOD/MWR Specific Data
9002	Payroll Import Data
9003	Retirement Plan Data at Termination
9005	KRONOS Information

♦ Logging On and Off

Before you can use SAP, you must log on. When you are finished working on your tasks in SAP, you log off. The first time that you log on, it will be with a generic password that your administrator will provide you. You will be prompted to change your password every 90 days.

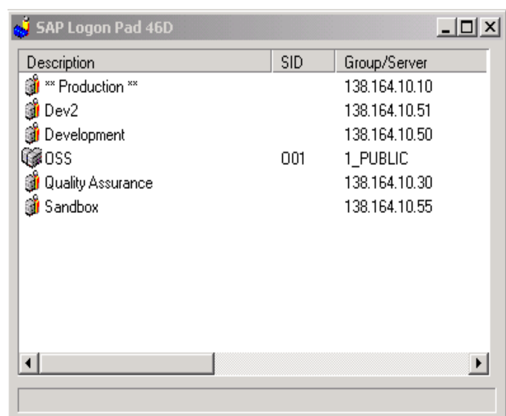
Starting SAP

To start SAP, proceed as follows:

Double click on the desktop icon.

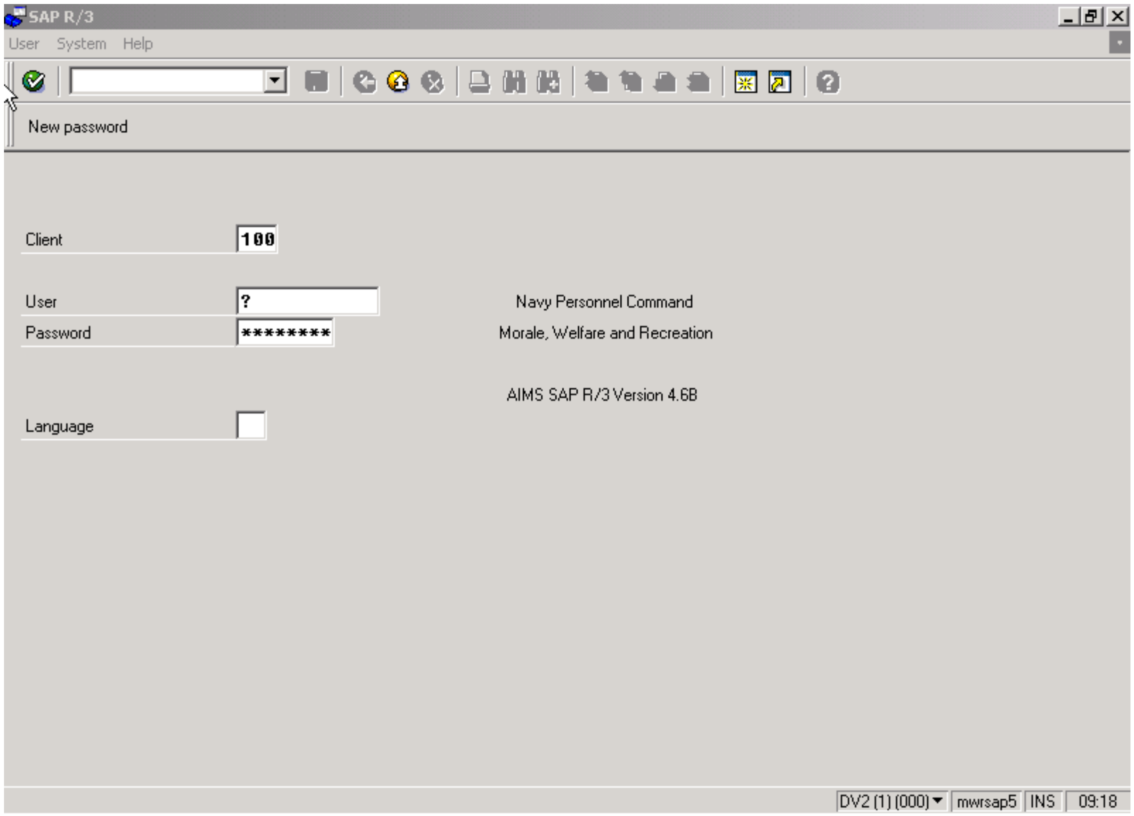
The SAP Logon screen appears.

You will be presented with the client choices shown in the
dialog box.



Double click the icon for the client in which you will be working.

The logon screen (with the title SAP R/3) appears in a new window, as shown on the following page and you are now ready to complete the log on process.



Logging On

Before you log on, make sure you know the client number, your userID and password.

During the SAP Logon process and while you work in SAP, you are often instructed to press the TAB key after you enter data in a field. When you press the TAB key, the cursor moves to the beginning of the next field.

If you are logging on for the first time:

Your system administrator will provide you a password to use when you log on for the first time. During this initial process of logging on, you must provide a new password, one that you create. After that, you will use your own password whenever you log on. (These procedures might differ somewhat from what your system administrator might determine is suitable for your local situation; see your system administrator for details)

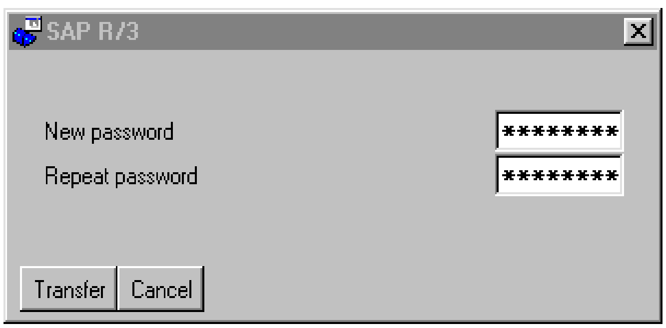
To log on to SAP, make the following entries in the fields on the logon screen:

1. In the client field, enter the client number (The correct client number usually appears automatically when working in the Production client).
   If a default number appears in this field, you can change it by overtyping it or accept it by leaving as is.

2. Press the TAB key to move to the next field.
3. In the User field, enter your User ID
4. Press the TAB key to move to the next field.
5. In the password field, enter the initial password your system administrator has given you.

Note: As you type the password, the asterisks remain in the field and only the cursor moves. As a security measure, the system does not display what you type.

6. The new password dialog box is displayed as shown:



7. In the New password field, enter a new password. (See Rules for creating a password, if you need help.)

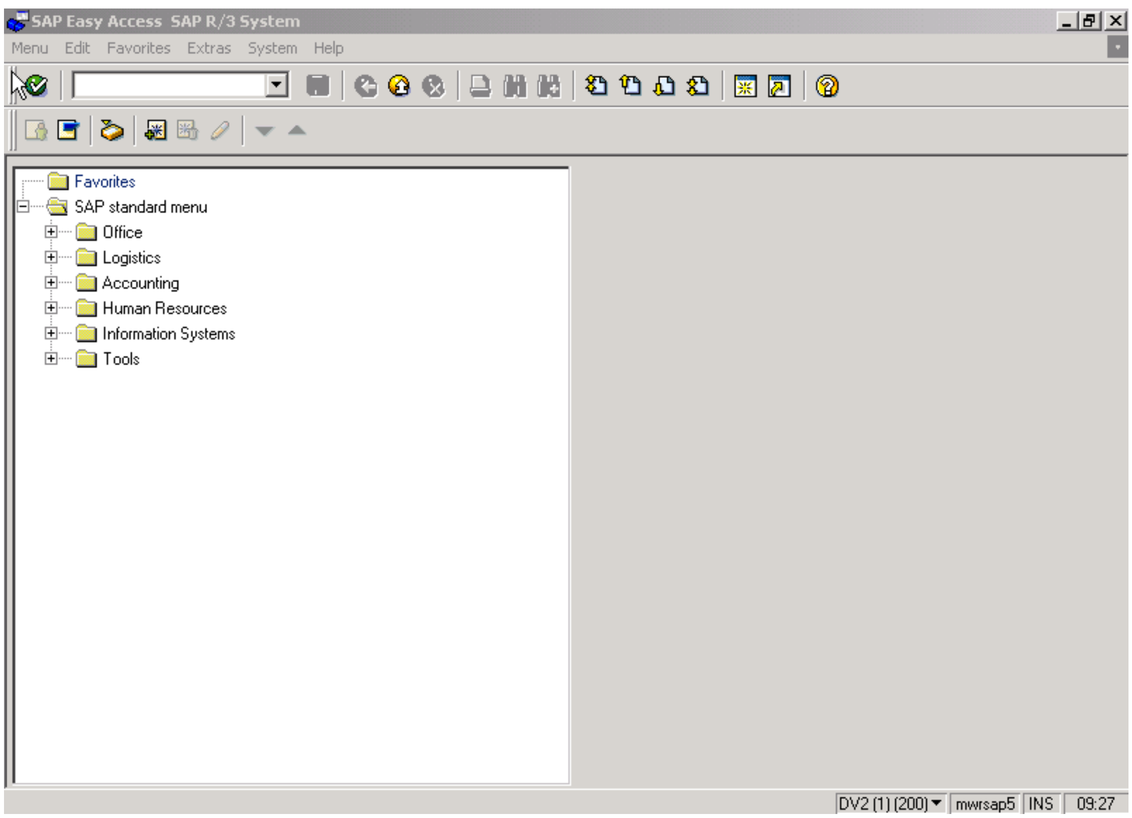
8. Press the TAB key to move the cursor to the Repeat password field.

9. In the Repeat password field, enter your new password again, exactly as you entered it the first time.
10. Press ENTER or click the green check  mark to log on to SAP.

If you have logged on previously:

1. In the client field, enter the client number
2. Press the TAB key to move to the next field.
3. In the User ID field, enter your User ID.
4. Press the TAB key to move to the next field.

   In the Password field, enter your password and note that the asterisks remain in the field and only the cursor moves. As a security measure, the system does not display what you type.
5. Press ENTER or click the green check mark  to log on to SAP.
6. You have successfully logged on to SAP



♦ Rules for creating a Password

A password is a combination of characters that you enter every time you log on to SAP. Your password prevents other people from accessing or changing your work.

Remember your password, you cannot log on to SAP without it.

Follow these rules when creating a password:

1. It must have exactly 8 characters.

2. You may use any combination of alphanumeric characters. Valid characters include: the letters “a through z” and the numbers “0 through 9“

3. Do **NOT** begin a password with any of the following: a question mark, an exclamation point or a blank space.

4. Do **NOT** begin a password with three identical characters (for example, bbbat).

5. Do **NOT** begin a password with any sequence of three characters that is contained in your User ID (for example, “smi”, if your User ID is “sea_dsmi”

6. Do **NOT** use “password” as your password

7. Do **NOT** use any of the last five passwords you used (does not apply the first time you log on)

YOU WILL BE PROMPTED TO CHANGE YOUR PASSWORD EVERY 90 DAYS. DO NOT USE A PASSWORD YOU HAVE USED PREVIOUSLY WHEN PROMPTED TO CHANGE YOUR PASSWORD TO A NEW ONE.

NOTE: In SAP, passwords are NOT case-sensitive.

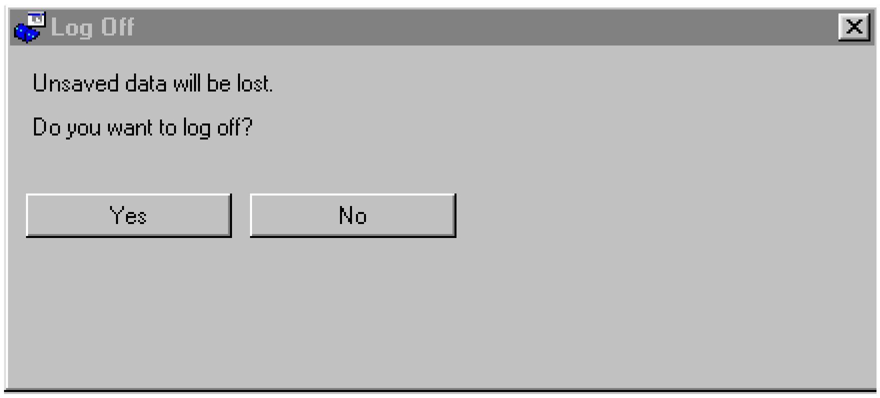
Logging Off

You can log off SAP from any screen.

To log off SAP, follow these steps:

1. From the menu bar, choose System → Log off OR click the in the upper right corner of the window.

2. The Log Off dialog box appears (as shown here) informing you that any data you have not saved will be lost if you proceed with logging off.



3. If you are not certain that you have saved all your data, click **No**. You will return to the screen you were working on.

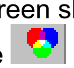
4. If you are certain that you have saved all the data you want to save, click **Yes**. All of your SAP sessions are closed and you are returned to your Windows environment. You have successfully logged off the system.

Creating Screen Shots

There are times when it is useful to have a hardcopy of a screen. One example is when you have a problem within the system and have trouble describing the look of the screen to a remote help desk and it would be advantageous to fax a hardcopy of the screen.

To create the hardcopy:

1. In the  menu, located in the upper right corner of your screen, select Hardcopy
2. A hardcopy of the screen shot is printed out at the default printer specified for your PC.

> **NOTE**: You cannot take a screen shot of a screen with an open dialog box, because you cannot access the  menu. However, there is a Windows work around. Press the Print Screen key on your PC. This will store a copy of your screen into the clipboard. Open MS Word or Wordpad and paste the image that was stored on the clipboard.

♦ Working with Sessions

You might want to work on more than one task at a time while in SAP. In this case, you may create a new session. You can open up to nine sessions and do a different task, or the same task, in each one. You can move around between the open sessions, and you can close any session without having to log off the system.

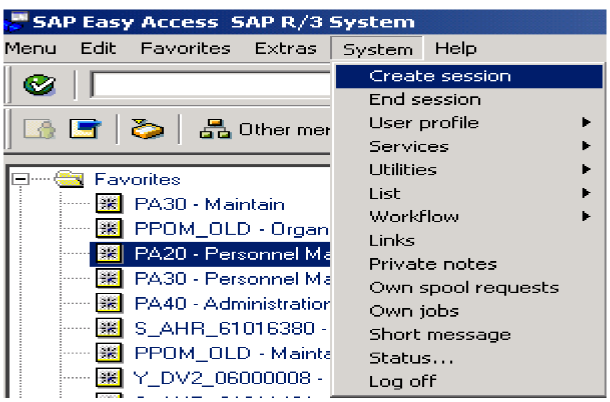
Creating a New Session

You can create a session at any time and from any screen in the system; you do not lose any data in sessions that are already open. Nine sessions can be created. Each session you create is as if you logged on the system again. Consequently, the system has more work to do, which can affect how fast it responds to your requests.

Steps for creating a new session:

To create a new session from anywhere in the system, use the following menu path:

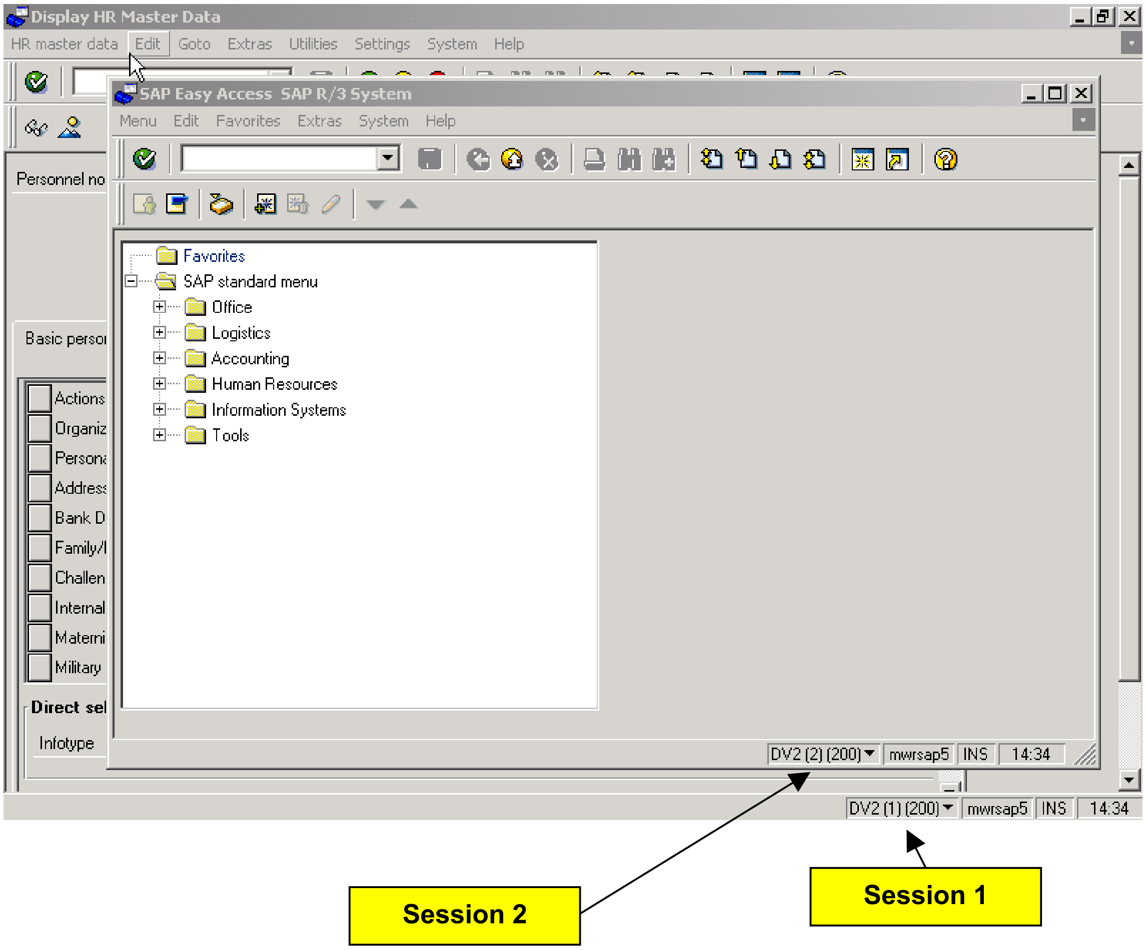
Menu path: SYSTEM → Create session



Alternatively, you may click this icon from the menu bar 

The system opens an additional window with the new session running in it. The system places this new window in front of all the other windows on your computer screen. The new session becomes the active session and will remain so until you move to a different (either pre-existing or new) session.

The following shows the new session window on top of the existing one. Note the session number in parentheses in the status bar.


Display HR Master Data
HR master data Edit Goto Extras Utilities Settings System Help
Personnel no
Basic perso
Actions
Organiz
Person
Address
Bank D
Family/
Challen
Internal
Materni
Military
Direct sel
Infotype
SAP Easy Access SAP R/3 System
Menu Edit Favorites Extras System Help
Favorites
SAP standard menu
Office
Logistics
Accounting
Human Resources
Information Systems
Tools
DV2 (2) (200) mwrsap5 INS 14:34
DV2 (1) (200) mwrsap5 INS 14:34
Session 2
Session 1

Moving among Sessions

You can move easily among sessions. As you move between sessions, no data is lost.

As long as you remain logged on to SAP, you can leave any session for as long as you like. Moving to a different session is like putting a telephone call on hold: you can resume whenever you are ready.

Steps for moving To a Different Session

> One method of moving between sessions is to use the keyboard shortcut key ALT + TAB. Using these keys will move you between the open sessions.
>
> Alternatively, you may click the icon representing the session on the taskbar at the bottom of the Windows 95/98/NT screen.
>
> Another method of moving between sessions is to minimize the session you are working on to expose the session you wish to move to.

Ending a Session

After you are finished working with a session, it is a good idea to close it. Each session uses system resources and the more sessions open at the same time is reflected in the speed that the system is able to respond to your requests.

WARNING: Before you end a session, save any data that you wish to keep. When you end a session, the system will NOT prompt you to save your data. However, if you have only one session open and you end it, you will log off the system. Before logging you off, the system WILL prompt you to save your data.

1. Menu path: SYSTEM → End Session

OR

2. Click the ☒ in the upper right corner of the window holding the session you want to close.

When you close one session, you will be returned to the previous session.

♦ Getting around in SAP

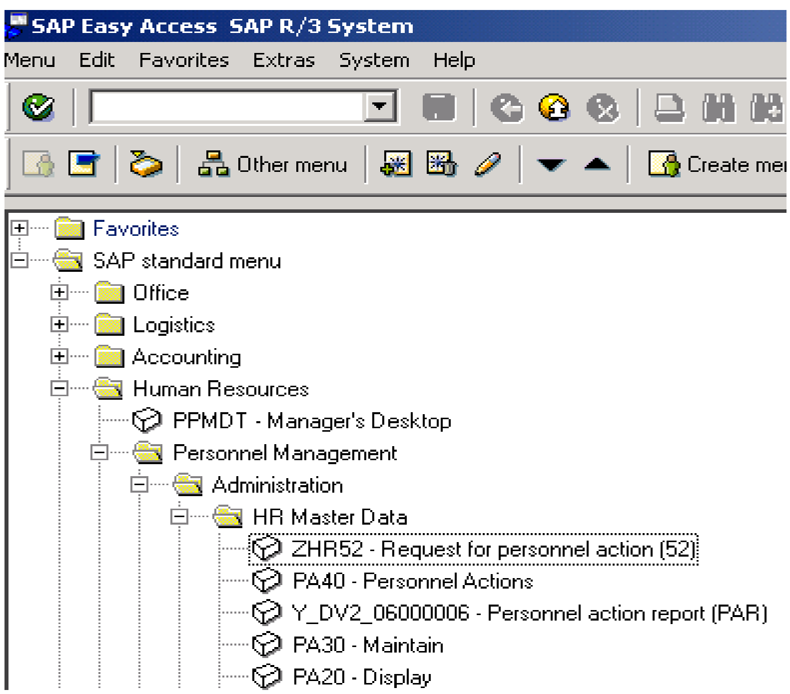
In SAP, there are two ways to perform a task:

1. You can select the task from a series of menus and functions. With menus, you can easily find your application without having to memorize special codes.
2. You can enter a transaction code in the command field. With transaction codes, you can go directly to a task without having to travel through several different menus, i.e. PA20, PA30, or PA40.

Using Menus to Select a Task

After you log on to SAP, you need to choose the application and the task that you want to work on, then choose a function to start the task.

Using the menus in the menu bar, you can navigate to the application and the task you want to start, and you can choose the function to start the task. With menus, you can easily find your application and functions without having to memorize transaction codes.



Jumping Directly to a Task with Transaction Codes

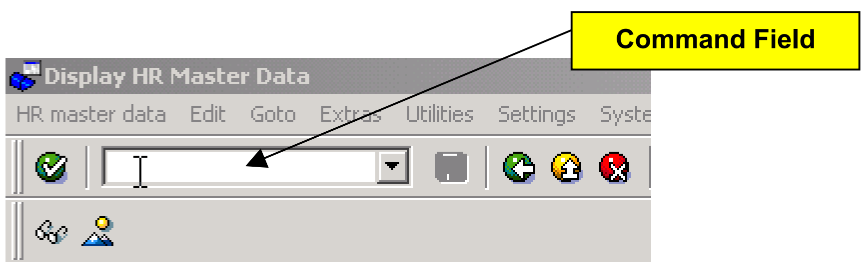
By entering a transaction code instead of using menu paths, you can go directly to a task and start the function in a single step.

Note that not all transaction codes in HR will take you directly to an input screen. Some transactions codes will take you to a beginning screen, for which you must make some choices before being taken to the appropriate input screen.

What is a Transaction Code?

A transaction code is a variable length character code that takes you directly to the screen for the task you wish to perform. For example, say you are working in the Personnel Management application and your task is to display master data. You can use the menu path to display master data, or you can use transaction code PA20 – the transaction code for displaying master data in the Personnel Management application.

Each function in SAP has a transaction code associated with it. A transaction code consists of letters, numbers, or both. "PA40" and "PPM_OLD" are both valid transaction codes. You enter transaction codes in the command field.

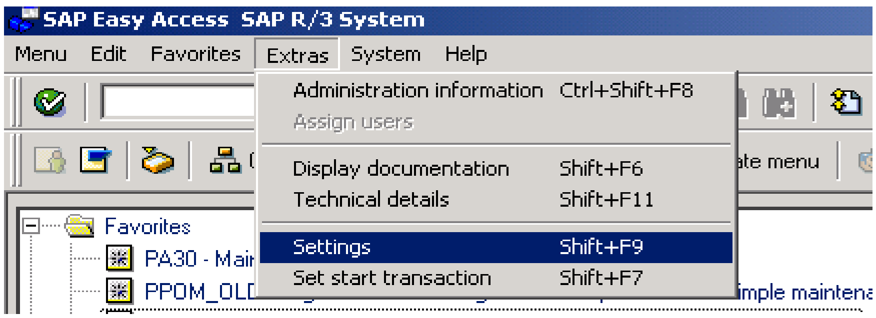


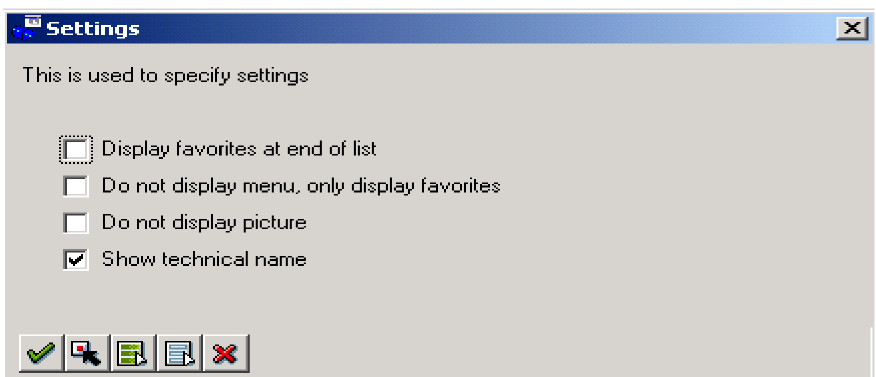
Before you can use a transaction code, you have to find the transaction code for the task that you want to start. Then you use the transaction code to start that task.

Finding the Transaction Code for the Task You Want to Start

There are a number of ways to determine the Transaction Code for the process that you wish to start. Two of the easiest ways are as follows:

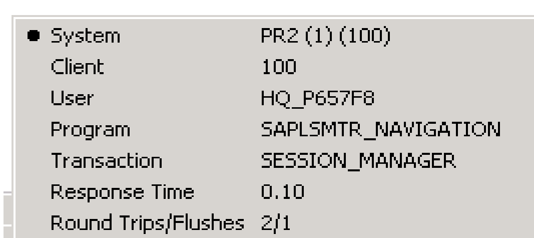
First, when you first open the SAP system and the tree structure is shown, by clicking the Extras menu item;





Make sure "Show Technical Name" is checked. The transaction code for the individual process will be shown on the tree structure at the lowest level.
If you check the box "Do Not Display Picture" the SAP Waterdrop will not be displayed and will not slow down your system.

In addition to this method of determining the Transaction Code for a particular procedure, you may also click the drop-down arrow located on the status bar at the lower right corner of the screen. The pop-up window will also list the Transaction Code.



Entering a Transaction Code

Once you have found the transaction code for the task you want to start, you can enter the code.

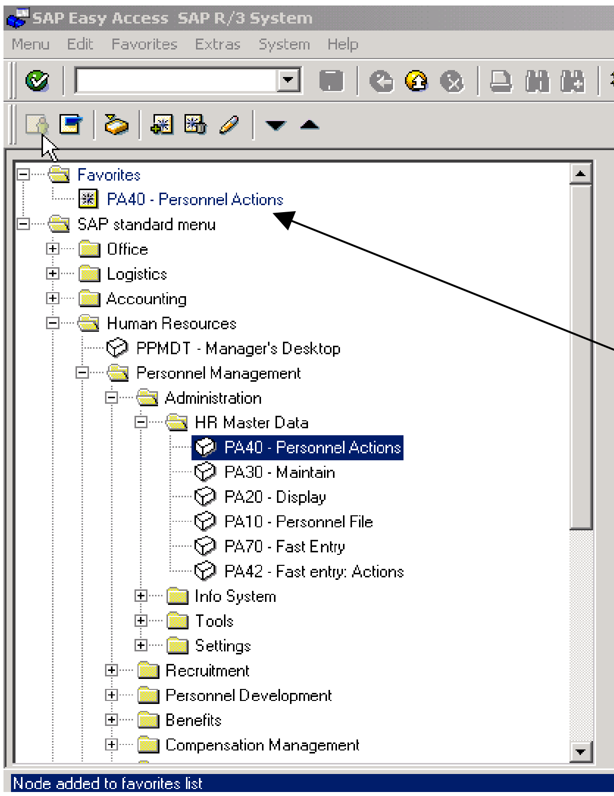
1. Place the cursor in the command field. Do this by clicking in the field with the mouse or by pressing CTRL+TAB.

2. Enter /n (to end the current task) followed by a transaction code. For example, for transaction code "fd01", you would enter "/nfd01"

3. Press the ENTER key or click the Green arrow.

Using the Favorites List

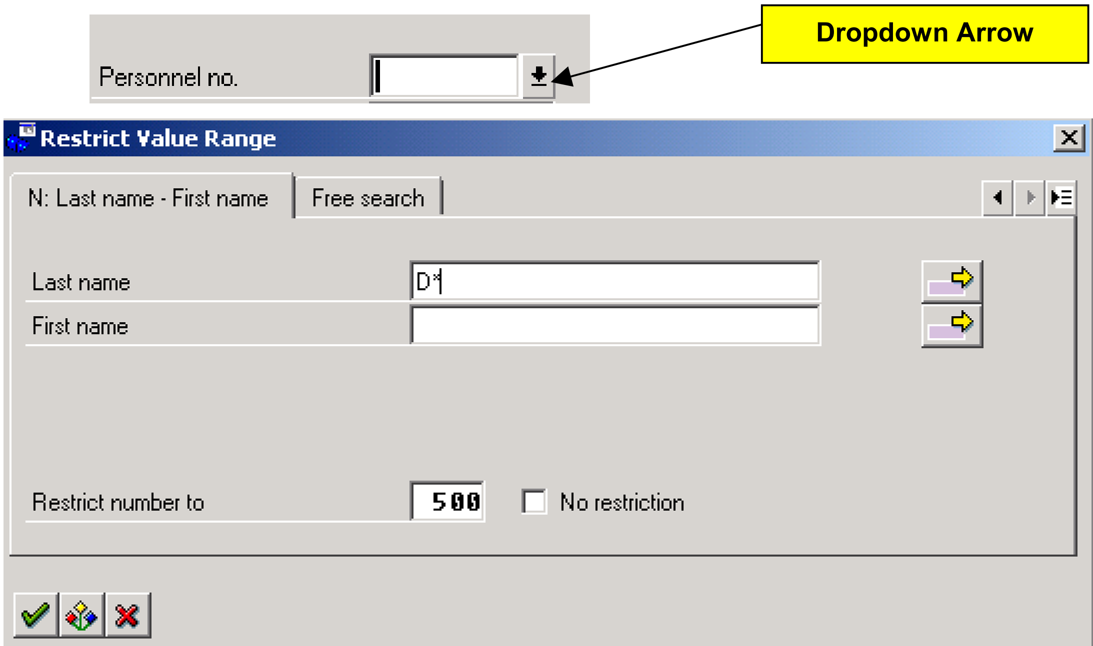
One of the ways of working within SAP is to use the Favorites procedure. As a user works within the system for some time, they will find that they are using the same transactions over and over again. The system has a built-in method of gathering all of these dissimilar URL's (web pages), documents and procedures into one area labeled Favorites.



There are many ways to add to your Favorites list. One of the easiest is illustrated for you. By clicking on the PA40 – Personnel Actions node under the path Human Resources > Personnel Management > HR Master Data, the user can "drag and drop" the node on the Favorites folder on the tree. When this user logs on and exposes the Easy Access tree, they can click directly on the PA40 Personnel Actions node in the Favorites folder and go directly to the opening screen within this procedure without traveling through the entire menu path. As you can see, the PA40 – Personnel Actions node in the full path has been dragged and dropped on to the Favorites folder at the top of the tree.

Steps for Displaying Possible Entries

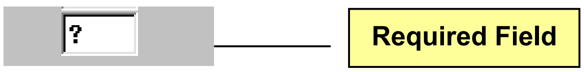
1. Click on the dropdown arrow. A dialog box appears. Enter the last name of the employee or enter the first letter and an asterisk.



2. In the list, find the entry that you want. If the list is too long to display in the dialog box, you may have to scroll up and down to find the entry that you want. You can use the scroll bar to do this.
3. Click on the entry and press ENTER, or simply double click on your choice.

Required Input Fields

When you work in SAP, you will often encounter fields with a question mark (?) in them. These input fields are called required fields. An example is shown here.



If the screen you are working on contains required fields, you must enter data in those input fields before you can proceed to the next screen in the task.

When you click on OK to proceed to another screen, if you have not completed all the required fields on a screen, SAP will display an error message in the status bar. At the same time, it will place the cursor in the required field so that you may make the necessary data entry.

Ending A Task

After you have completed a task, you will want to end it. Sometimes, you might want to end at task without completing it.

To end a task:

1. In the menu bar, click on 

2. If you have already saved the data, or you haven't entered any data, the system ends the task and returns to the initial screen of your application.

   If you entered data while working on this task, but did not save it yet, the system displays a dialog box prompting you to save your data. You have the following options:

- Click Yes to save the data and end the task.
- Click No to end the task without saving the data.
- Click Cancel to return to the task.

Background Information

We will input data into the basic personnel data section; the appropriate data to be transported to the ADP payroll processor and data necessary for the KRONOS automated Time and Attendance collection program. In addition, through this single "point of entry", all pertinent information regarding taxes, benefits, DOD/MWR mandated demographic information, Internal Revenue data, emergency contacts, etc. will be entered into the Human Resources module. We are trying, through the implementation of this Personnel/Payroll Human Resources system, to eliminate the constant duplication of data that is rampant in a "paper based" system.

Of course, all the necessary recruitment and approval steps should be taken prior to the actual entering of the data. A paper SF52 will be part of the Official Personnel Folder and Vacancy Recruitment File, and should be serving as the information source for much of the electronic data to be entered. It is very important that the SF52 identifies the position number of the job that the new employee is being assigned to. The validity of the position number/job number should be confirmed earlier in the process and if a new position must be established, the personnel specialist authorized to establish new positions, should do so. It is also highly recommended that a locally developed data sheet should be given to the new employee to fill out so that the necessary personal information is readily available for the data input procedure.

The aim in the Human Resources component is to be able to process employee related data according to the MWR/VQ business requirements in an effective structure and in a timely manner.

The Human Resources module uses a system of data types called **infotypes**.

Data is grouped according to content. Each infotype has been set up to collect and store particular data. For example, Infotype 0040, Objects on Loan tracks the information regarding departmental equipment that is in the possession of an employee. Infotype 0009, Bank Details stores the information necessary to process the direct deposit of an employee's paycheck.

The infotypes appear as an entry screen for the user, through which you can maintain infotype records. Infotypes can be processed individually or in fast entry mode.

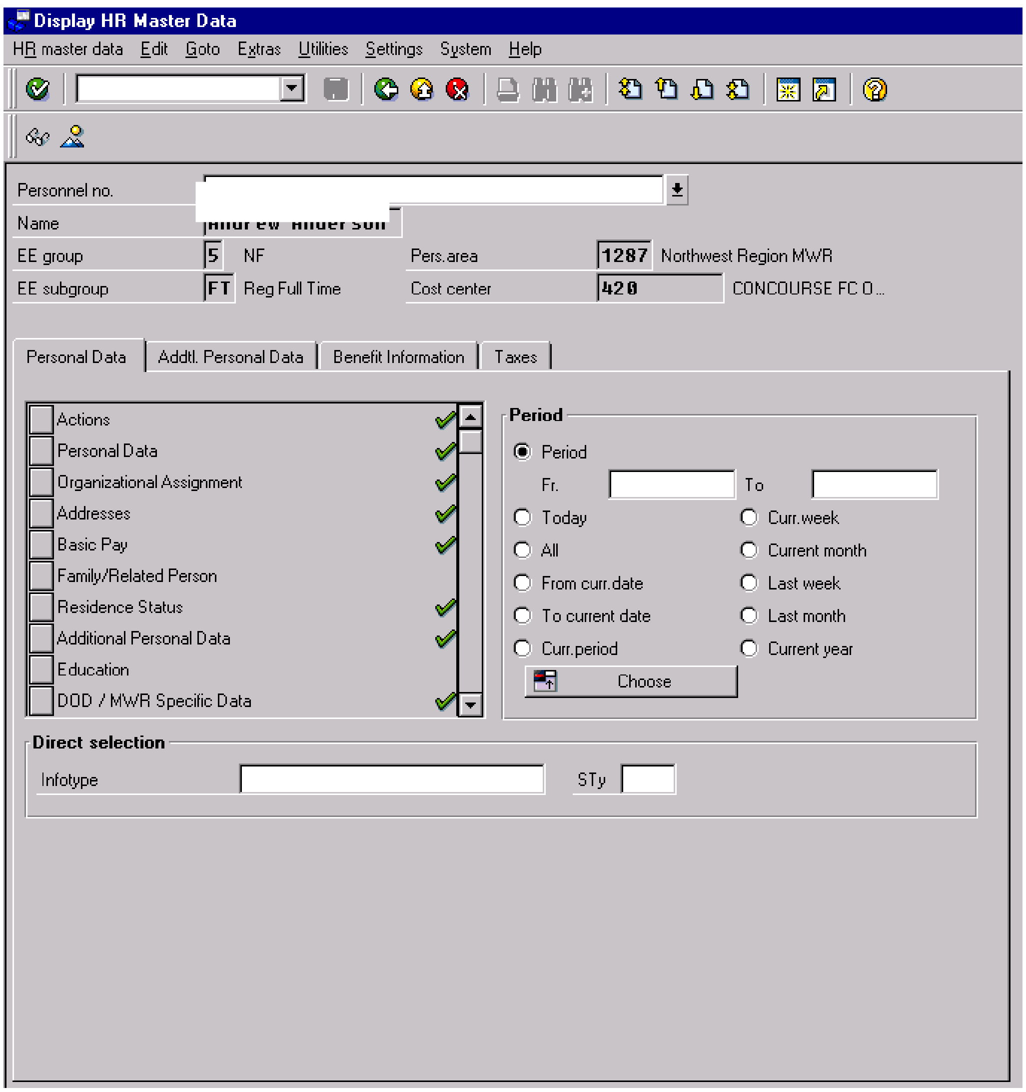
Display Master Data

When it becomes necessary to only look at the Master Data rather than make changes to it, use the procedure as explained below.

Note: No changes can be made to the data in this mode using this transaction code and menu path. **This procedure is for display purposes only.**

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > DISPLAY MASTER DATA**

Transaction Code: **PA20**



You must first search through the Employee database to find the employee whose records you wish to look at. At this point, we can enter the employee number directly, if known or use the dropdown arrow to search for the correct employee.

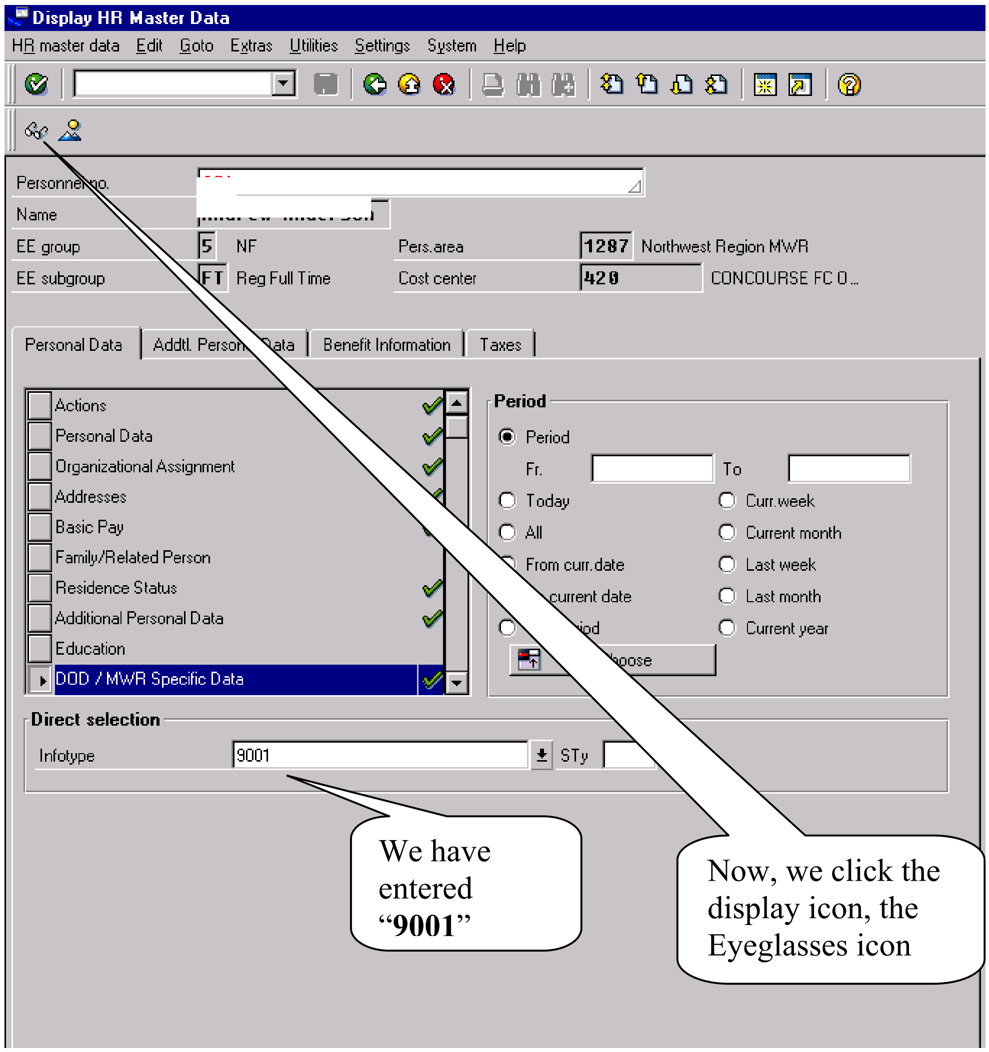
In our example, we have directly entered the number "624" and hit the enter key to verify that the employee is the one we are looking for, a Mr. Anderson who works out of the NW Region in Bangor.

We now must decide what data pertaining to Mr. Anderson do we want access to. As you know from reading the opening page of the New Hire process documentation, all the pertinent data is entered into a series of infotypes that are numbered and are labeled with a text title.

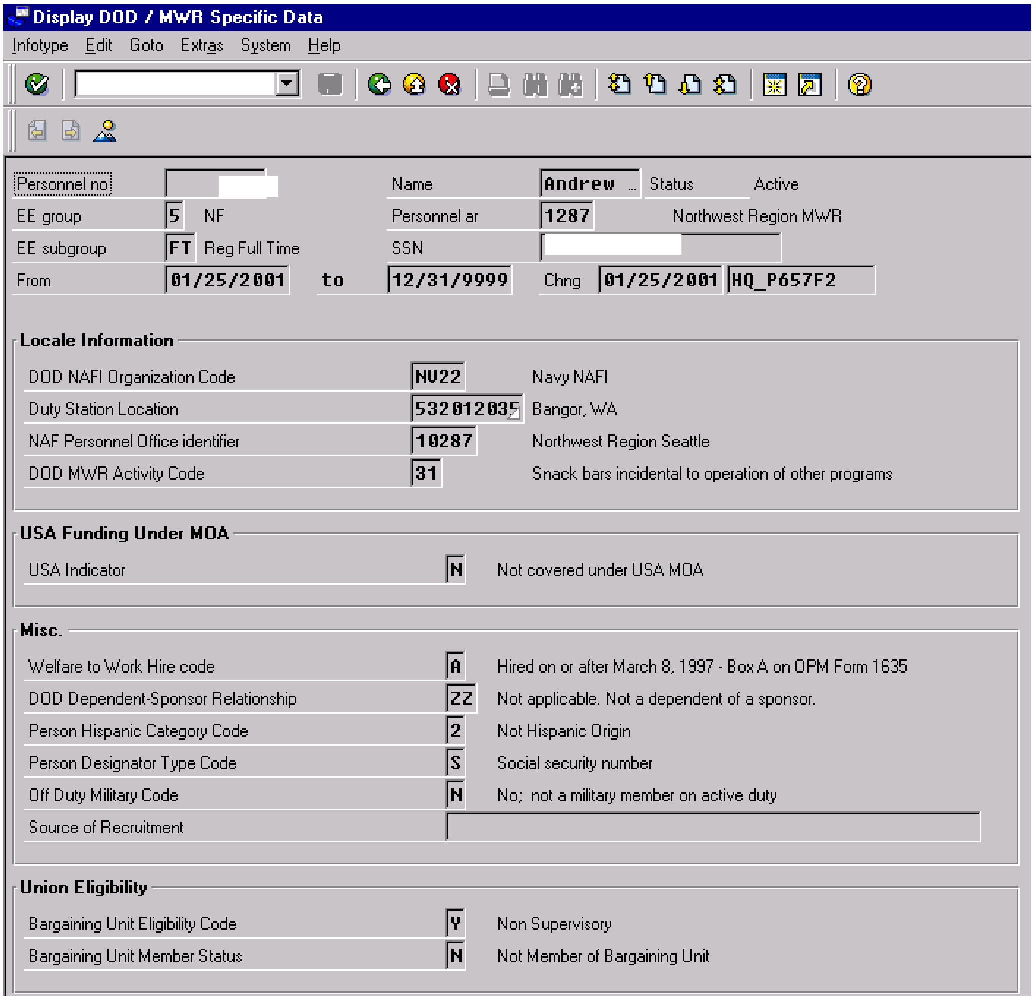
We have decided that we would like to inspect, not change the information that is part of the DOD/MWR specific data infotype, which is numbered 9001.

We can access this data for Mr. Anderson in one of three ways:

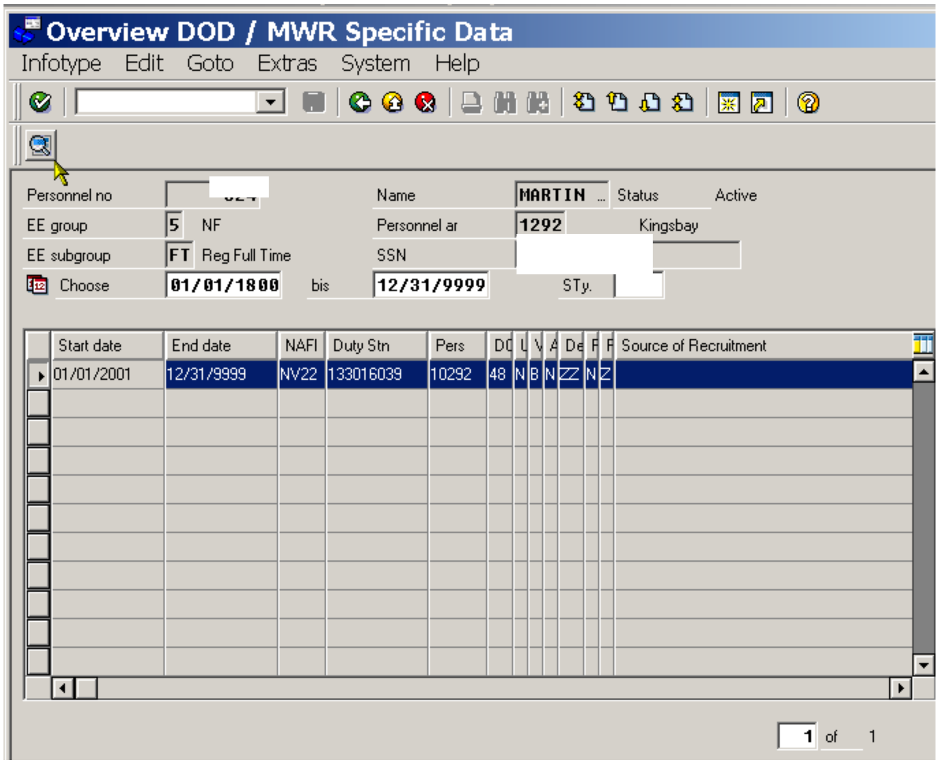
- We can click on the Personal Data tab, click in the area next to the text that is labeled DOD/MWR Specific Data, then click the display icon to open the infotype.
- We can type in any part of the infotype title in the direct Infotype entry box, click the enter key to display the full name of the infotype, then click the display icon to show the infotype.
- We can type in the number of the infotype in the Direct Infotype box and then click the display icon as shown below.



You now have access to all the information in this particular infotype for the chosen employee as shown below.



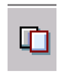
The document overview icon looks at all the same data in a different way. Once you highlight a particular action type (one with a Green check mark on the line so that you know there is information contained in it) and click the Document Overview icon, the following screen opens



You may now look at any of actions listed by clicking in the small entry box to the left of the line and clicking on the  icon on the applications toolbar.

NOTE: The information as shown on these infotypes using PA20 can only be looked at, they cannot be changed or modified in any way.

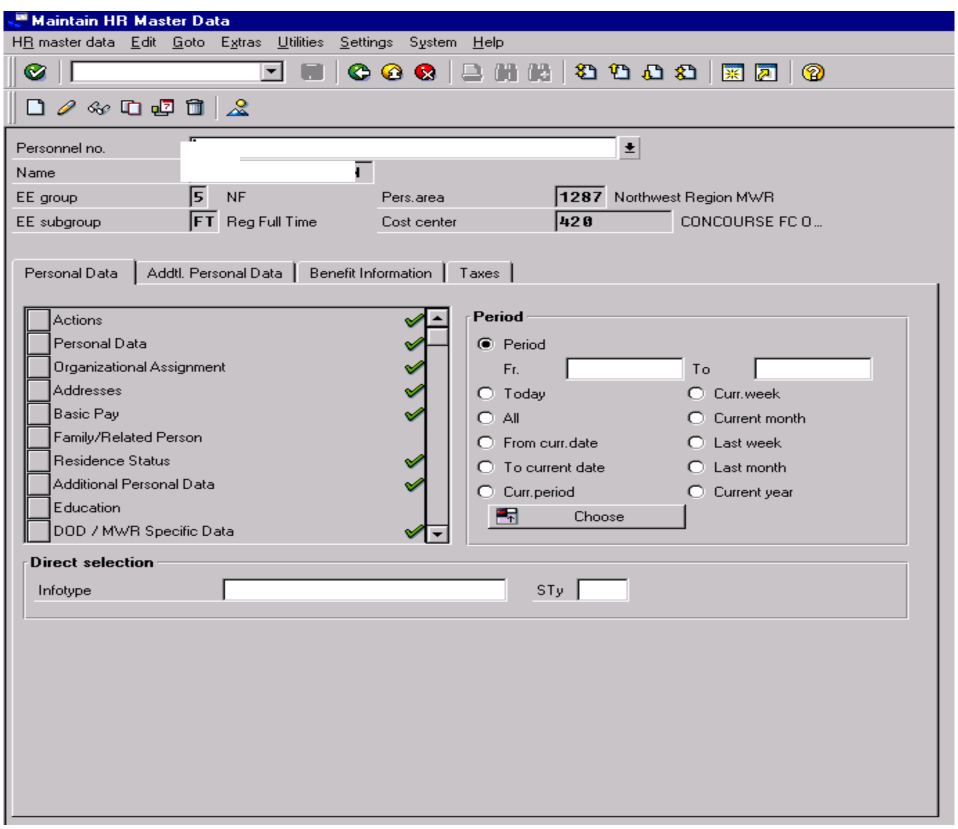
Maintain Master Data

Do this when it is necessary to maintain (change or update) Master Data. If the infotype has an existing record that will be delimited because of the information that you are about to enter, it is better to use the copy icon  and change the information accordingly. Using this method, all relevant fields are sure to be populated correctly. There is a detailed explanation of the three choices of icons that may be used: **Create, Change,** or **Copy** in the table on the next page.

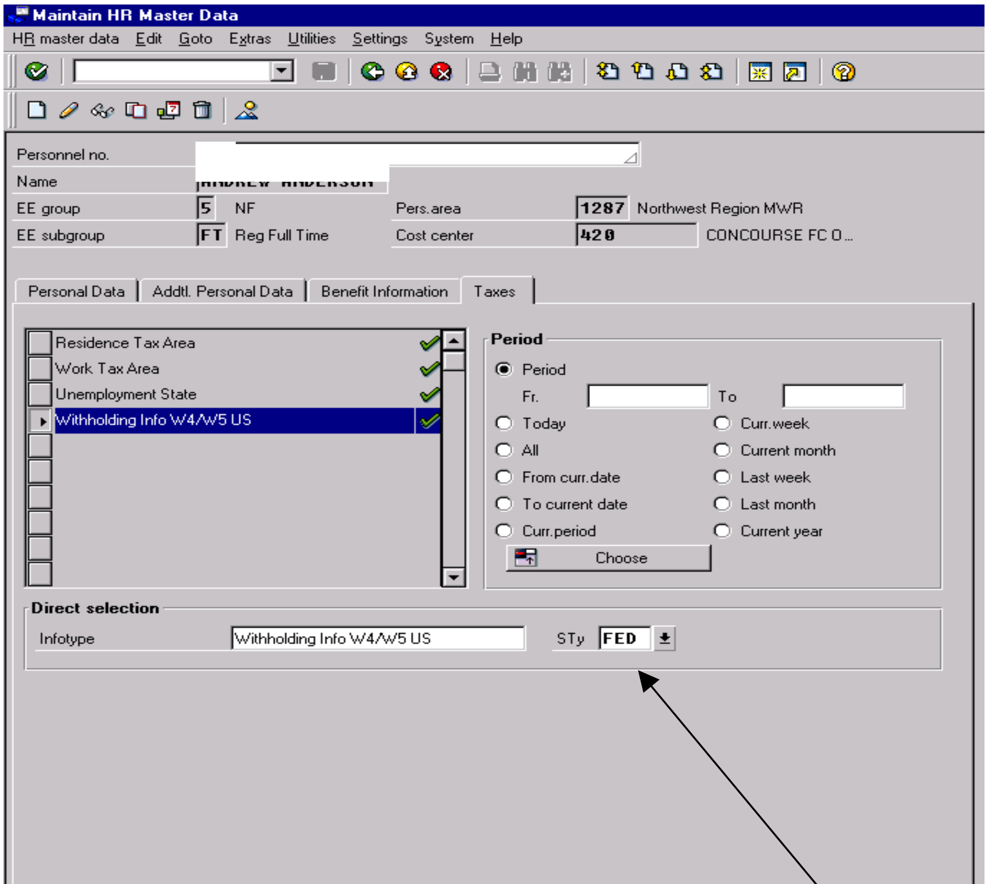
After you have entered your changes to an infotype and used the enter key, you should receive a warning message telling you that a previous entry has been delimited. This warning verifies that you actually want to make the change and that you have changed the “From date” to reflect that your record will now be the current one. You may proceed through the message by using the Enter key again and you will then be reminded to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN HR MASTER DATA**

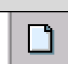
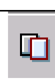
Transaction Code: **PA30**



Select the correct infotype, the one relevant to the changes or additions needed. Verify that there is no action to use to take you through all the necessary screens, such as a transfer. An example of going directly to Maintain Master Data is to process a change in an employee's W-4 Withholding form.

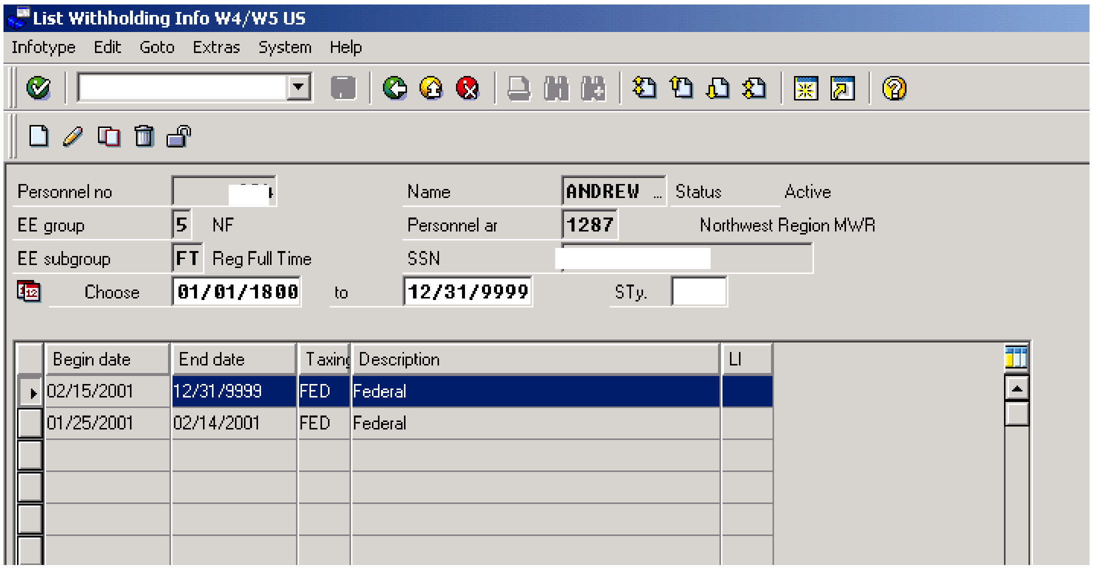


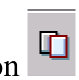
We have gone to the "Taxes" tab and highlighted the line reading **Withholding Info W4/W5 US. We have also used the dropdown menu to choose the Sty "FED".**

Icon Name	Icon	**Description**
Create		Used to create a new record using one of the infotypes
Change		**Will delete history and should only be used in the case of a typing error and if no payroll has been run.**
Copy		The recommended choice. Make the copy and then make the changes/additions.

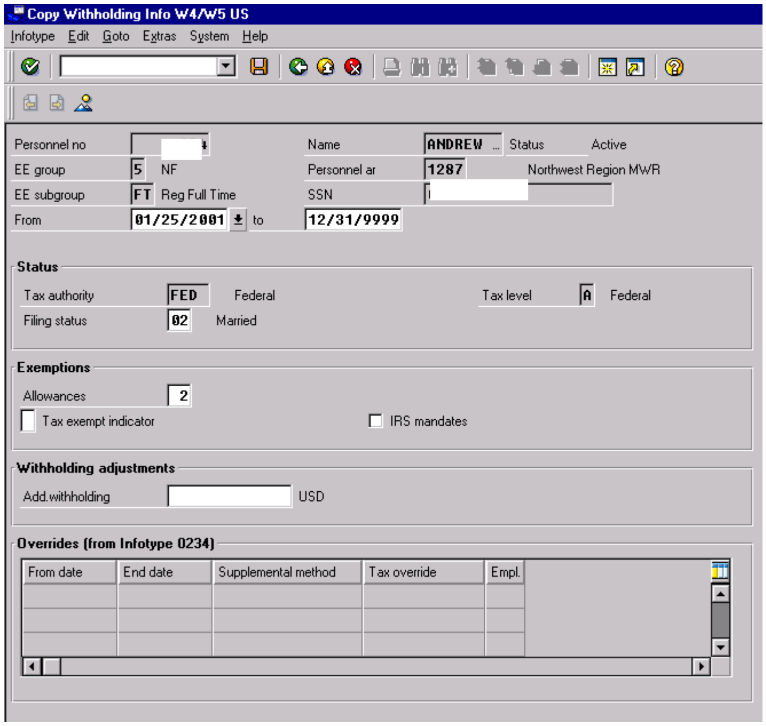
Another method of accessing the information to be changed is to click the Document Overview icon from the opening Actions screen after selecting the infotype. We have gone to the "Taxes" tab and highlighted the line reading **Withholding Info W4/W5 US.**

Click the Document Overview icon 



Highlight the line we wish to change and click the Copy icon  and a copy of the infotype that we wish to use is shown on the screen. In this case, Infotype 0210 Subtype FED – **Copy** Withholding Info W4/W5 US

***Copy** Withholding Info W4/W5 US*

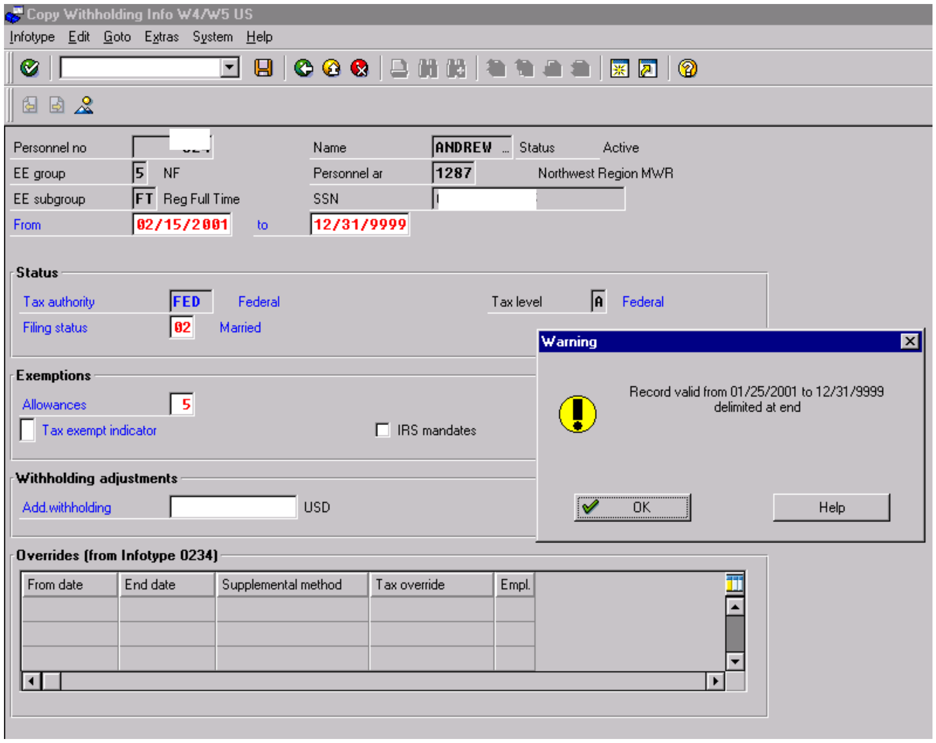


The screen shows a copy of the existing infotype 0210 – Withholding Info W4/W5 US
The title bar shows the word "COPY" before the name of the infotype.

Below is the input table example for this infotype. The information will change based on each infotype selected. We will make some changes to this record to illustrate how the procedure is done.

Field Name	Description	R/O/C	User Action/Values
From	Effective Begin date	R	Enter a date when the change is to become effective. **We used 02/15/2001 the date the W4 was signed by the employee**
To	The End Date	R	Defaults to 12/31/9999. No Entry required
Filing Status	Filing Status	R	Married, Single, etc.
Allowances	Number of exemptions	R	**We changed this from 2 to 5 because of the triplets ready to be born.**
Tax Exempt Indicator	Tax Exempt Indicator	O	Use only if partial or no Federal taxes are to be withheld. Dropdown menu available.
Additional Withholding		O	Enter additional amount in whole dollars if applicable.

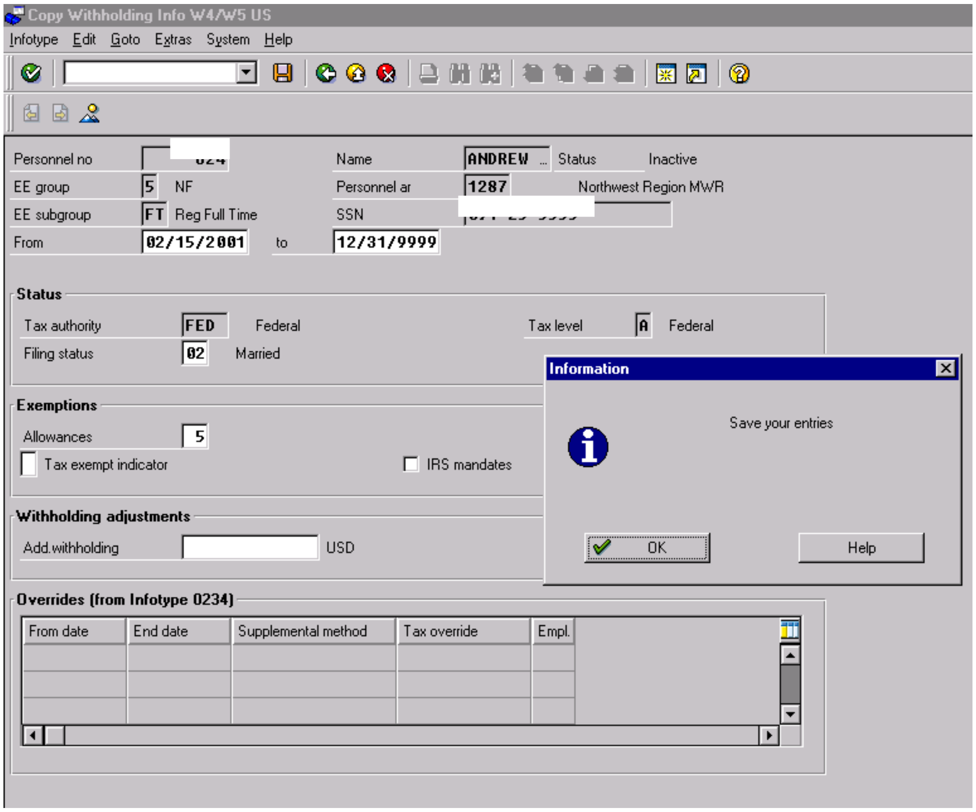
Press the Enter icon 



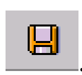
You will see the Record Delimited-warning message in the pop up window and on the Status bar at the bottom of the screen.

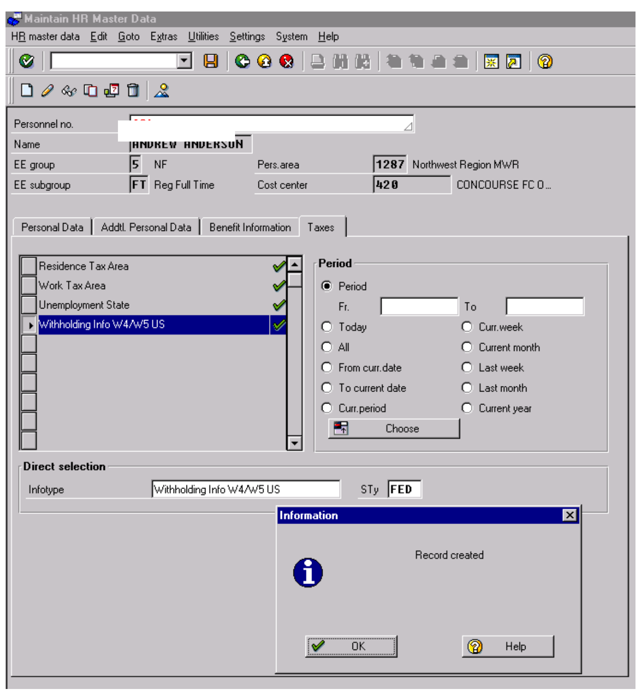
Press the Enter icon  again.

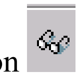
When making changes to the Bank Key or Bank account number, the effective date must be the date the employee signed the direct deposit form, making sure it is not the first day of the pay period.

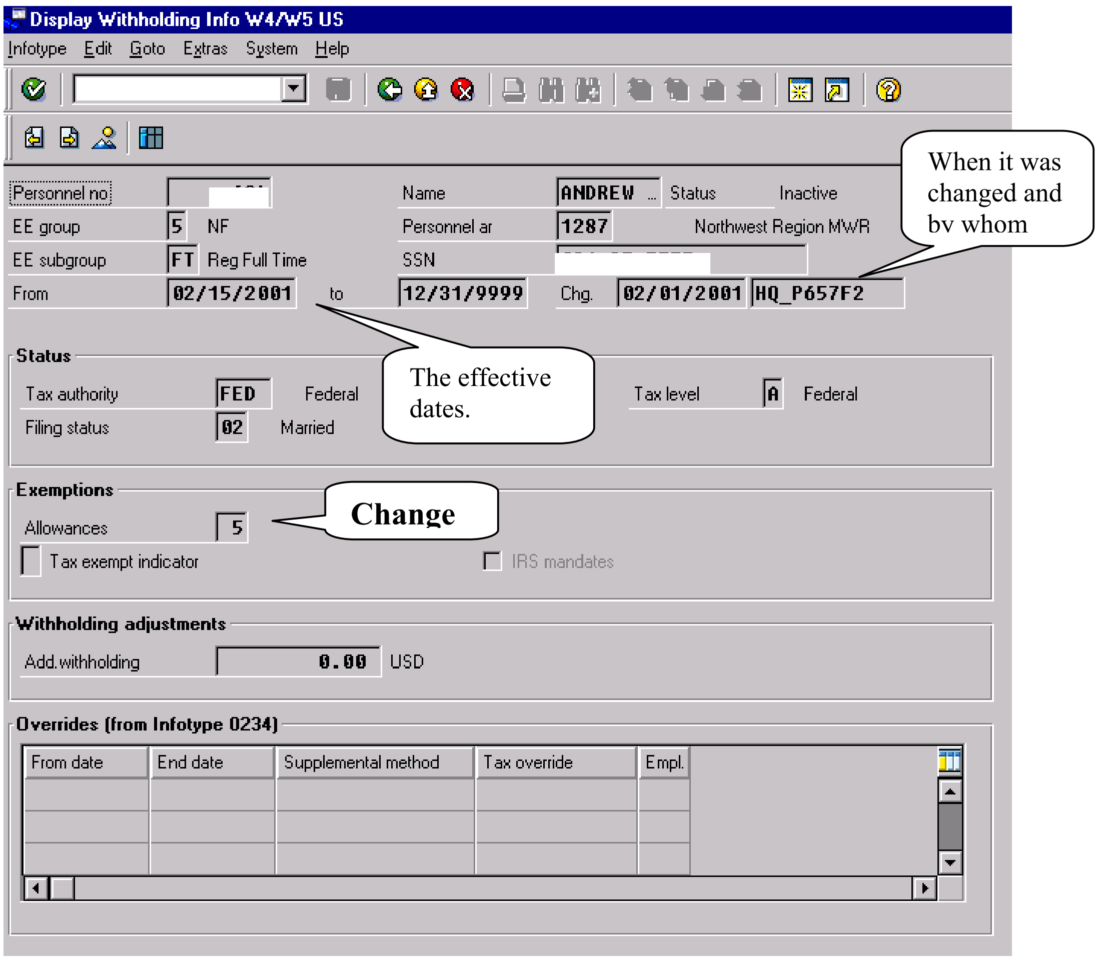


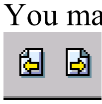
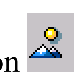
We now get the standard reminder on the screen to “Save your Entries”

Click the Save icon .



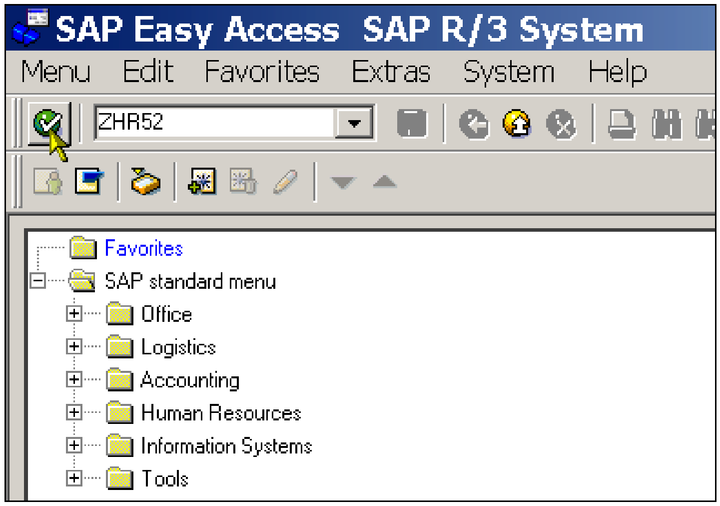
The record has been changed and the process involved used a copy so that no history was lost. We can verify that there are actually infotype records documenting the changes to the Withholding tax information by using the display icon  and checking the infotype itself or click on the document overview icon  again to review the changes made. Here is the display and you can see that the effective dates are included as is the date the information was changed to reflect the new number in the Allowance field.



You may cycle back and forth between both copies of this infotype using the two icons , or you can also retrieve the information using the Document Overview icon  and double-clicking on the line you wish to see to open all the detailed information.

Request for Personnel Action (52)

Use transaction code **ZHR52**, and select  to go to the next screen.



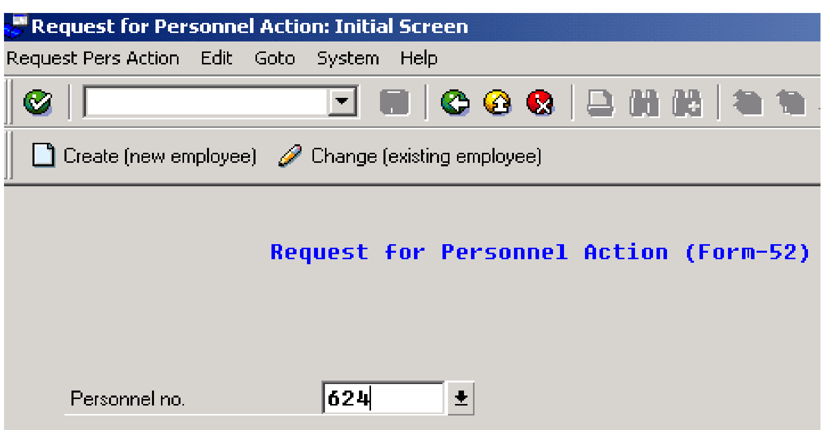
There are two ways to generate a request for personnel action:

- with personnel number

-OR-

- with position number.

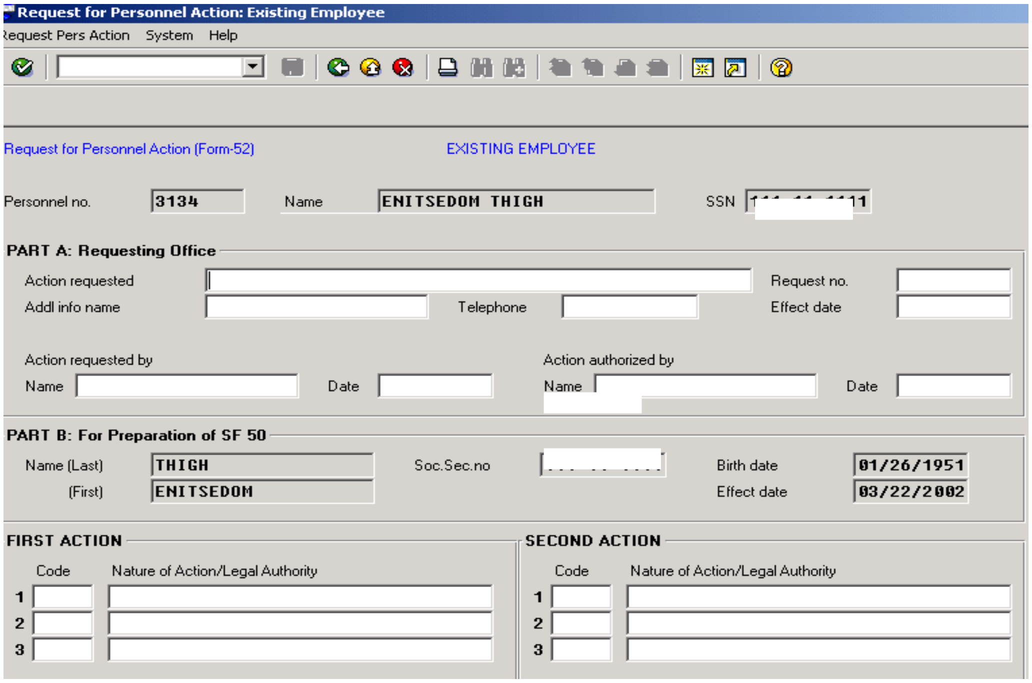
__Request for Personnel Action__



To use **personnel number**, enter it into the personnel number field, and select the 

icon.

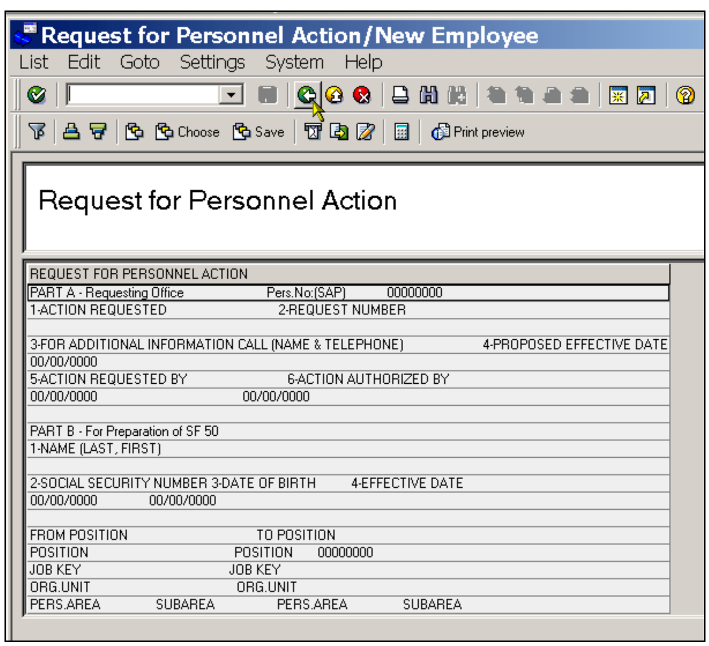
Request for Personnel Action



Enter any applicable remarks to be printed on the 52. Select the  icon to continue.

Select output device, then 

. The 52 should look like the following illustration:



The "landscape" view appears..

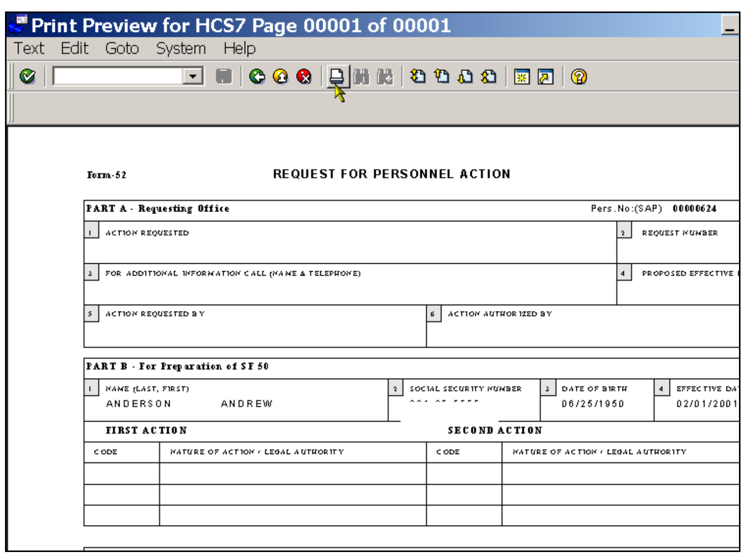
If the user entering new hire data in ADP is not the same user who created the new hire in SAP, the PAR must be forwarded to the ADP person. If the ADP user has access to SAPmail, send the PAR from the print preview screen (landscape view) using the following procedure:

- Click on envelope icon (under the green arrow)
- Click attachment document content
- Select recipient using drop down arrow
- Select internal user and green check
- Fill in last name, first name
- Click send

NOTE: When emailing the 52, the sender should also save a copy to a personal folder named "Sent 52s." This allows for more efficient follow-up if the recipient does not receive the sent copy. Once the 52 has been emailed and printed, the same 52 cannot be reprinted without completely re-entering.

Select  to get "portrait view."

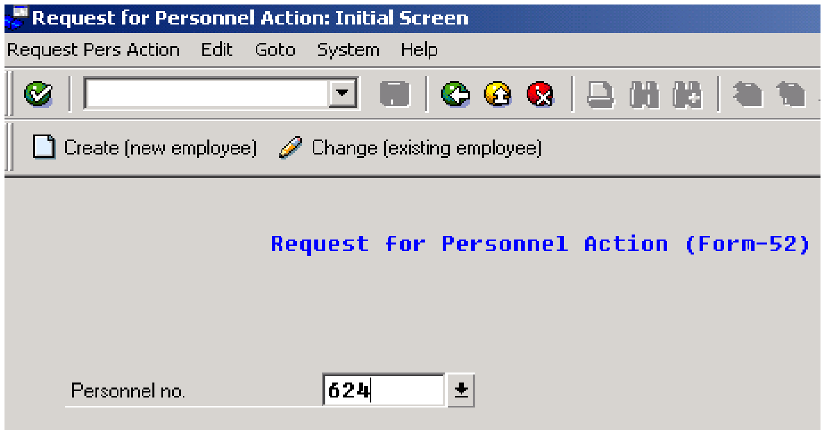
Request for Personnel Aciton (portrait view)



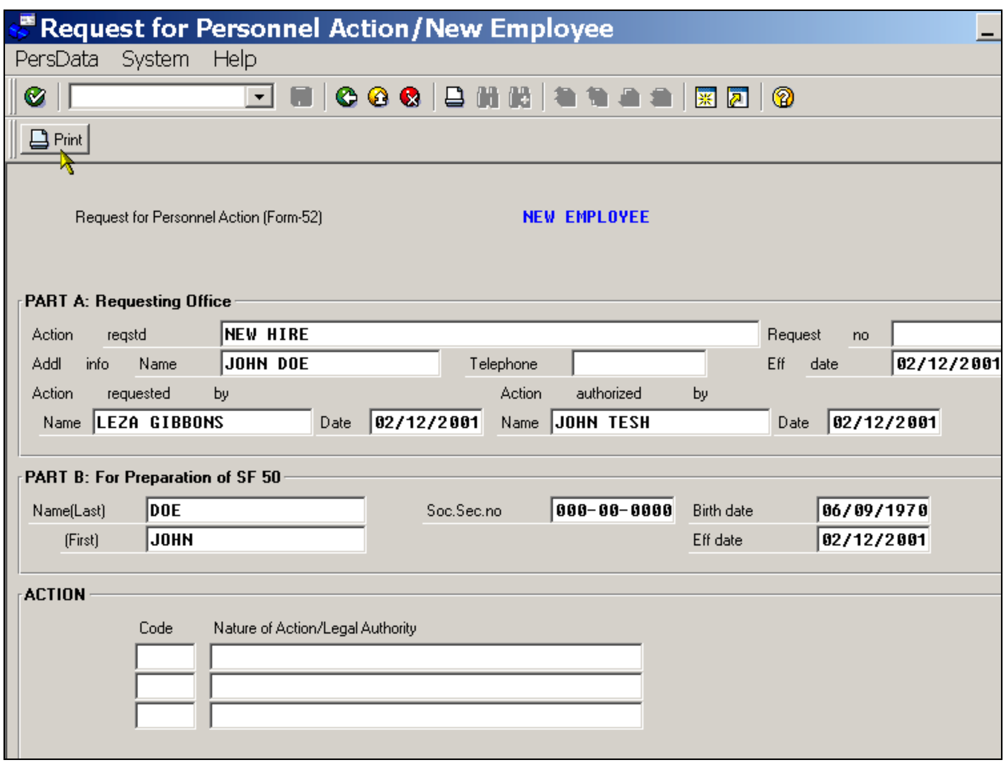
Select the  to print.

To generate the report by position number, in the initial screen, leave personnel number blank, then select the 

icon.



Enter the applicable information on the next screen:



Select the  icon to print. Be sure to select 

to verify entries and email before printing!