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| Master Data Script  SAP S/4HANA - 18-09-20 | public |
| Create Employee Master Data for Service (47Y) |

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# Overview

In this document you find a description of how to create employee master data in your SAP S/4HANA system. For SAP S/4HANA Service scenarios, employee master data is mandatory. This master data script documents which data you need to maintain in which infotype so that the following SAP Best Practices scope items can be executed: Service Contract Management (426), Presales Management (41V), Service Order Management (41Z), Interaction Center Service Request Management (41W). Values that are not relevant for this scope as delivered by SAP Best Practices are not described in this document.

# Prerequisites

## System Access

|  |  |
| --- | --- |
|  | Details |
| System | Accessible via SAP GUI. For WebClient UI access, your system administrator provides you with the URL to access the application with the appropriate business role. The last step 'Assigning Employees to Position' you will do in SAP Fiori UI. |

## Required Organizational Units

Before implementing this master data script, ensure that you have set up the Organizational Model as described in the set-up instruction guide of the scope item(s) you want to use.

For the sample data used in this master data script, we assume that you have implemented the SAP Best Practices content for US. The predefined values for US start with 17. If you have implemented another country version, or created your own data, replace the sample value accordingly.

# Overview Table

This scope item consists of several process steps that are listed in the following table:

If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.

You can find all other apps not included on the homepage using the search bar.

If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose Settings > App Finder .

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| [Creating System Users](#unique_5) [page ] 5 |  | SAP GUI: SU01 | System user is created |
| [Adapting System Users](#unique_6) [page ] 7 |  | SAP GUI: SU01 | Initial password is reset |
| [Creating Employees](#unique_7)  [page ] 8 |  | SAP GUI: PA30 | Employee master data is created |
| [Verifying Employee – System User Assignment](#unique_8) [page ] 12 |  | SAP GUI: BP | Business partner is created for an employee |
| [Assigning Employees to Positions](#unique_9) [page ] 13 | Customer Service Manager (Customer Management) | Search Organizations | Employees are assigned to positions |

# System Users

## Creating System Users

Purpose

To be able to logon to the system, usually your system administrator provides you with a system user.

For details regarding User and Authorization Management, refer to the SAP S/4HANA Service Security Guide that you can find at https://help.sap.com.

If your user has sufficient authorizations, create the following test users. You can create the following test-users that you can assign to employee master data, which are also created for testing purposes as described below.

If your user does not have sufficient authorization to create users, ask your system administrator to create the following test users:

|  |  |  |  |
| --- | --- | --- | --- |
| Scope Item | User | Name | Function |
| Presales Management (41V) | SLS\_MAN  SLS\_EMPL | Jennifer Stone  Michael Curtis | Sales Manager  Sales Employee |
| Service Order Management (41Z) | SERV\_EMPL  SERV\_TECH | Barbara Lee  Matthew Carter | Service Employee  Service Technician |
| Service Contract Management (426) | SERV\_EMPL | Barbara Lee | Service Employee |
| Interaction Center Service Request Management (41W) | IC\_AGENT\_SRV  IC\_AGENT\_SUP | Ann Anderson  Peter Best | IC Service Agent  IC Support Agent |

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1. | Log on | Log on to the SAP S/4HANA (SAP GUI) system as a configuration user. |  |  |
| 2. | Access transaction SU01 | Choose Tools > Administration > User Maintenance > Users .  (Transaction Code: SU01) | The User Maintenance: Initial Screen appears. |  |
| 3. | Create system users | Make the following entry   * User SERV\_EMPL * Choose Create | Maintain Users screen appears. |  |
| 4. | Enter address data | On the tab Address, enter the address.  Last Name: Lee  First Name: Barbara  Function: Service Professional | Address data is maintained. |  |
| 5. | Enter logon data | In the tab Logon Data, enter the following data:   * User type: Dialog |  |  |
| 6. | Enter roles | On the Roles tab, enter the appropriate role |  | Your system administrator must provide the appropriate application authorization.For eaxample, for service specific authorizations SAP delivers PFCG role SAP\_S4C\_UIU\_SRV\_PRO. |
| 7. | Save | Choose Save. |  |  |
| 8. | Create system user | Make the following entry   * User SERV\_TECH * Choose Create | Maintain Users screen appears. |  |
| 9. | Enter address data | On the tab Address, enter the address.  Last Name: Carter  First Name: Matthew  Function: Service Technician | Address data are maintained. |  |
| 10. | Enter logon data | In the tab Logon Data, enter the following data:   * User type: Dialog * Initial password: Initial1 * Repeat Password: Initial1 |  |  |
| 11. | Enter roles | On the tab Roles , enter the appropriate role |  | Your system administrator must provide the appropriate application authorizations. For service specific authorizations, for example SAP delivers PFCG role SAP\_S4C\_UIU\_SRV\_EMP. |
| 12. | Save | Choose Save. |  |  |

Repeat steps 8.-12. for all system user that you would like to create for testing purposes.

## Adapting System Users

Purpose

The password for the new system users is still an initial value. With this activity, you change the initial password of each of the new system users with the first system logon.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1. | Log on | Log on to the SAP S/4HANA system with each newly created user. |  |  |
| 2. | Change password | Change the initial password Initial1 to the new productive password. |  |  |

# Employee Master Data

## Creating Employees

Purpose

This activity defines the HR master data records for each service employee. If you want to create more than one service and sales employee, for example you can create the following example data per scope item:

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1. | Log on | Log on to the SAP S/4HANA (SAP GUI) system as a configuration user  Choose Human Resources → Personnel Management → Administration → HR Master Data → Maintain (transaction Code: PA30). | The Maintain HR Master Data view screen is displayed. |  |
| 2. | Maintain personnel No. | On the Maintain HR Master Data view, depending on whether you have configured internal or external numbering, maintain Personnel no., for example, 00000001, or leave this field empty |  |  |
| 3. | Choose Infotype | Choose Infotypes -Actions, (Infotype 0000)  Choose Create. |  |  |
| 4. | Create Actions View | On Create Actions view, maintain the following settings:  Start date: for example, today’s date  To: for example, 31.12.9999  Personnel Action:  Action type: Hiring  Status:  Employment: Active  Special Payment: Standard Wage type  Organizational assignment  Personnel area: 1710 Region 1710 (US)  Employee group: 1 Employee  Employee subgroup: Y1 Employee  Choose Save. |  |  |
| 5. | Create Personal Data | On the Create Personal Data (Infotype: Personal Data 0002) view, maintain the following values:  Enter Name  Title: Enter title  Last name: for example,Lee  First name: for example, Barbara  Enter Additional Data  Date of Birth: dd.mm.yyyy  Nationality: US American  Choose Save. |  |  |
| 6. | Create Organizational Assignment | On the Create Organizational Assignment (Infotype: Organizational Assignment 0001 ) view, maintain the following values:  Enterprise Structure  Cocode: 1710 Company Code 1710  Pers. area: 1710 Region 1710 (US)  Cost Ctr: 17101321 Services/Consltg(US)  Sub area: 1710 Location 1  Personnel Structure  EE Group: 1 Employee  EE subgroup: Y1 Employee  Pay area: 99 Non-payroll-relevant  Organizational Plan  Position: 99999999 Default Position  Org Key: 1710  Administrator Group: 1710  Choose Save. |  | If the cost center field should be greyed out, refer to the Enabling Cost Center Assignment paragraph below. |
| 7. | Create Addresses | On the Create Addresses (Infotype Addresses 0006) view, maintain the following values:  Address  Address type: 1 Permanent residence  Street and House No.: enter street name and house no  Postal code/City: Enter postal code and city  Region: Enter region and place  Country Key: US USA  Choose Save. |  |  |
| 8. | Create Planned Working Time | On the Create Planned Working Time (Infotype: Planned Working Time 0007) view, maintain the following values:  Work Schedule: YB00 Flextime  Time Management Status: 0 0-No No Time evaluation  Working Time  Employment percent: 100  Daily working hours: Empty  Weekly working hours: Empty  Monthly working hours: Empty  Annual working hours: Empty  Weekly working hours: Empty  Choose Save. |  |  |
| 9. | Create Bank Details | On the Create Bank Details (Infotype Bank Details) view, maintain the following values:  Field Names – User action and values  Bank Details type: 0 Main bank  Payee: Lee Barbara  Postal Code/City: 94304 California  Payment Method: 0 Cash Payment  Choose Save. |  |  |
| 10. | Additional Infotype Views | If additional infotype views are offered after Save, choose Cancel. |  |  |
| 11. | Choose Infotype | On the Maintain HR Master Data view, in the Direct selection area, select the following data:  Infotype : 0105 (Communication)  STy (subtype): 0001 (System user name (SY-UNAME) |  |  |
| 12. | Create Communication | On the Create Communication (Infotype Communication) view, as System ID maintain the system user name you want to assign to the employee, for example, SERV\_EMPL.  Choose Save. |  |  |

Enabling Cost Center Assignment

For Service processes it is mandatory that a cost center is assigned to the service employees. If the cost center field should not be enabled for employee maintenance, proceed as follows:

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

|  |  |
| --- | --- |
| Transaction Code | SPRO |
| SAP IMG | Service > Master Data > Business Partner > Integration Business Partner-Organization Management > Set Up Integration with Organizational Management |

2. Maintain the following settings:

|  |  |  |  |
| --- | --- | --- | --- |
| Group | Sem. Abbr. | Value Abbr | Description |
| PLOGI | ORGA | Empty | Integration Switch: Organizational Assignment |

3. Save your entries.

4. Access the HR master data maintenance for all relevant employees, for example, via transaction PA30.

5. Choose HR master data > Maintain .

6. Enter the Personnel number, select the Organizational assignment infotype, then choose Change (F6).

7. Maintain the cost center and save your settings.

## Verifying Employee – System User Assignment

Purpose

When creating an employee, the system automatically creates a business partner with the BP role BUP003 Employee. In this chapter you check that the business partner has been created correctly. However, if the automatic synchronization is not active, it can be triggered manually via report, using transaction, SE38/SHCM/RH\_SYNC\_BUPA\_EMPL\_SINGLE.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Log on to the SAP S/4HANA system as a configuration user  Choose: Logistics > Settlement > Environment > Master Data > Maintain Business Partner (Transaction Code: BP). | The Maintain Business Partner Data view is displayed. |  |
| 2. | Open business partner view | On the Maintain Business Partner view, choose Open BP. |  |  |
| 3. | Search for BP | On the value help choose tab Partners by BP Role  Choose: BUP003 Employee  Choose Enter.  Select the Business Partner with the Name for which you maintained an employee in the previous chapter. |  |  |
| 4. | Check data | On the Address and Technical Identification tab, verify that the data you maintained in the previous chapter is displayed. |  |  |

## Assigning Employees to Positions

Purpose

In this activity you assign employees to positions that have been created in the set-up guide for the respective scope items.

Procedure (using WEB Client UI)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Log on to the SAP Fiori launchpad using the role Customer Service Manager (Customer Management). | The Fiori Launchpad is displayed. |  |
| 2 | Access the App | Choose Search Organizations. | The Search: Organizational Model screen is displayed. |  |
| 3 | Search for a position | In field Find by  Select Postion.  Choose Search.  In the Result List, select the line with the relevant position according to the sample organizational model and choose Employee. |  |  |
| 4 | Assign an employee to the position | Search for and select the relevant employee.  Save your entries. | Employees are assinged to the relevant positions. |  |

Assign the sample employees to the positions as per table below. This table shows the assignment of the Service Employee and Service Technician to the respective positions as an example.

Assign an Employee to Position for a Service Employee and to Position for Service Technician

|  |  |
| --- | --- |
| Position | Employee |
| Service Employee | Barbara Lee |
| Service Technici-an | Matthew Carter |

Employee Assignment for Interaction Center Positions

If you have created positions specific to the Interaction Center as described in the Setting Up Interaction Center Service Request Management (41W) guide, create the rele-vant users and employees as described above and assign them to the Interaction Center positions, for example:

|  |  |
| --- | --- |
| Position | Employee |
| IC Service Agent | Ann Anderson |
| IC Support Agent | Peter Best |

Assign an Employee to Position for a Sales Employee and to Position for Sales Manager

|  |  |
| --- | --- |
| Position | Employee |
| Sales Employee | Michael Curtis |
| Sales Manager | Jennifer Stone |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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