

# Transporting the Appraisal Templates in Performance Management



## Applies to:

SAP ECC 6.0 EHP4.

For more information, visit the [Enterprise Resource Planning homepage](#).

## Summary

The Appraisal system in Performance Management is based on templates. These templates are created in the development system and then transported to the Test/Quality/Production systems. This article is an attempt to explore the different options available to transport the templates.

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## Author Bio

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## Appraisal system in ECC 6.0

There are two appraisal systems available in SAP as of ECC 6.0 EHP4. We can use the old appraisal system and the new system based on MBO (Management by Objectives). This article concerns the options available to transport the new MBO based Appraisal Templates.

### What all is Transported in the Appraisal Templates

There are a whole lot of tables which are transported when we transport the Appraisal Templates. The main objects which have to be transported are:

1. Category
2. Appraisal Template (Includes Criteria Group and Criterion)

The tables transported for each of the object are:

Category:	Appraisal Template:
T77HAP_C	HRP1000
T77HAP_C_APPEE	HRP1001
T77HAP_C_APPER	HRP1002
T77HAP_C_COL	HRP5020
T77HAP_C_EXIT	HRP5021
T77HAP_C_OTHER	HRP5022
T77HAP_C_ROLE	HRP5023
T77HAP_C_STATUS	HRP5024
T77HAP_C_T	HRP5025
T77HAP_C_VALTY	HRP5026
T77HAP_C_WFE	HRPAD605
T77HAP_C_WFR	HRT1002
	HRT5021
	HRT5022
	HRT5023
	HRT5024
	HRT5025
	HRT5026

**Note:** Please make sure that you transport the Category first and the Appraisal Template later. Transporting the Appraisal Template before transporting the related Category will lead to inconsistencies.

### Options Available for Transport

There are three options available for transporting the Appraisal Templates:

1. Manual Transport
2. Automatic Transport
3. Downloading and Uploading

We will discuss each of the options in detail with the advantages and disadvantages of all three.

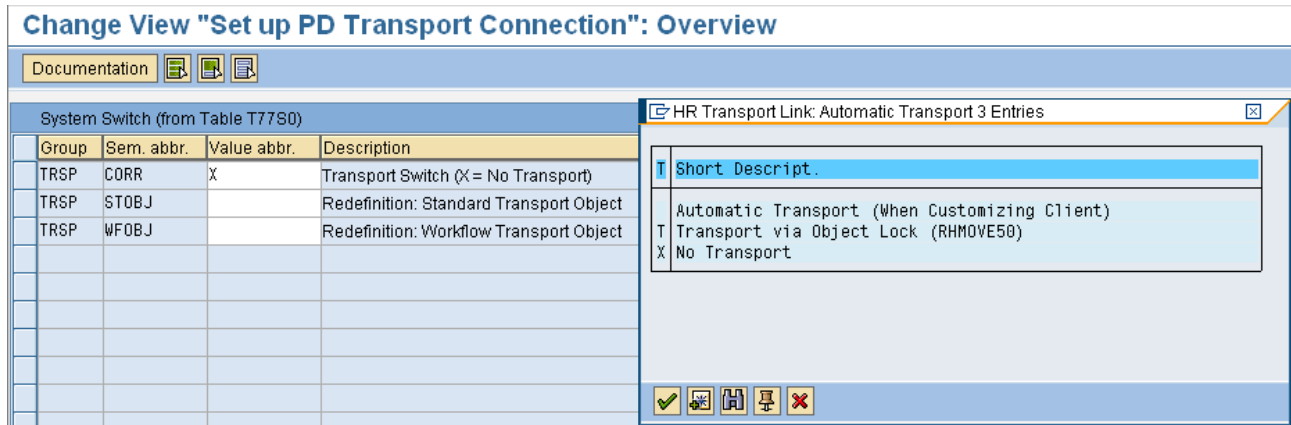
### Manual Transport

In the manual transport option, we can build the Appraisal Template in the development system and transport it manually to the target system.

How to do it?

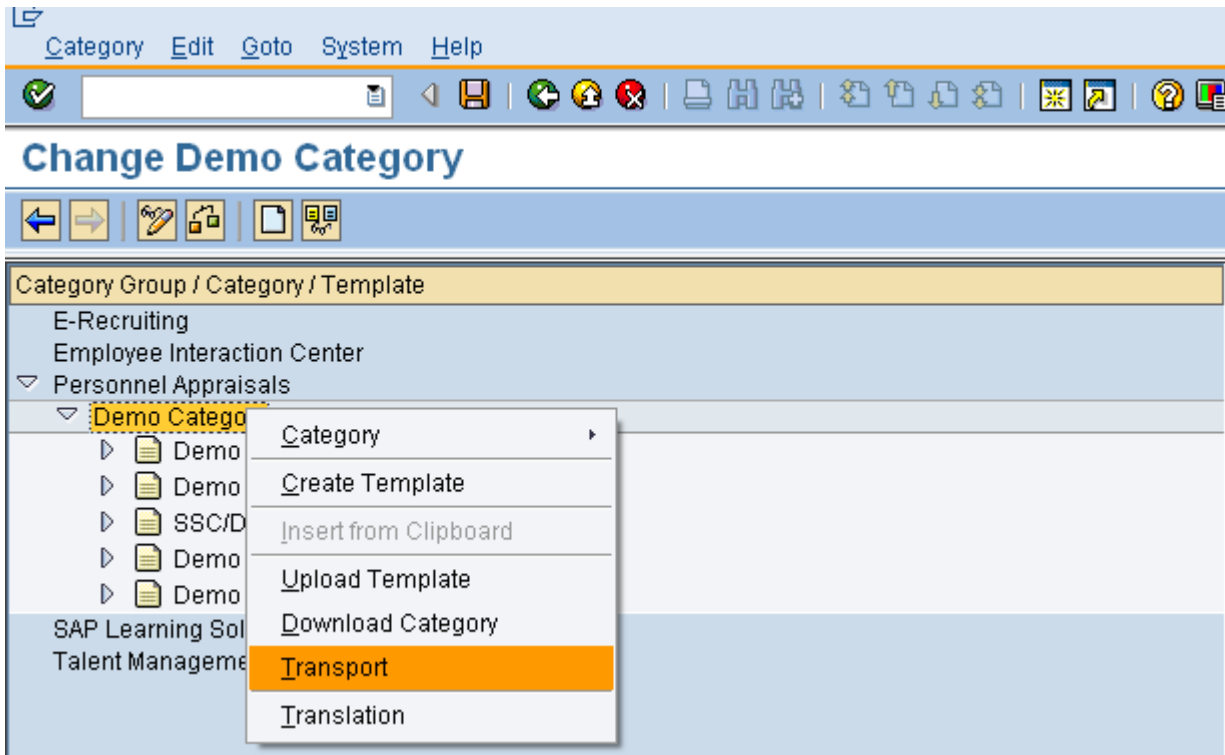
Step 1: Make sure the automatic transport is turned off. Go to SPRO → Personnel Management → Organizational Management → Transport → Set Up Transport Connection

For automatic transport, the option to be selected is 'X'.



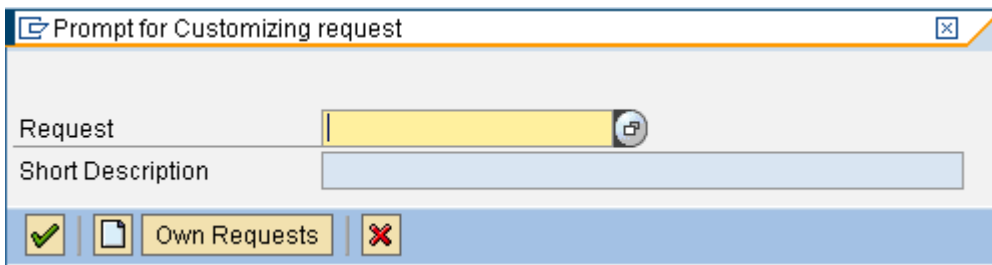
Step 2: Go to transaction PHAP\_CATALOG in the source system (where the configuration for Appraisal Templates has been done)

Step 3: Right click on the Category which is attached to the Appraisal Templates to be transported.



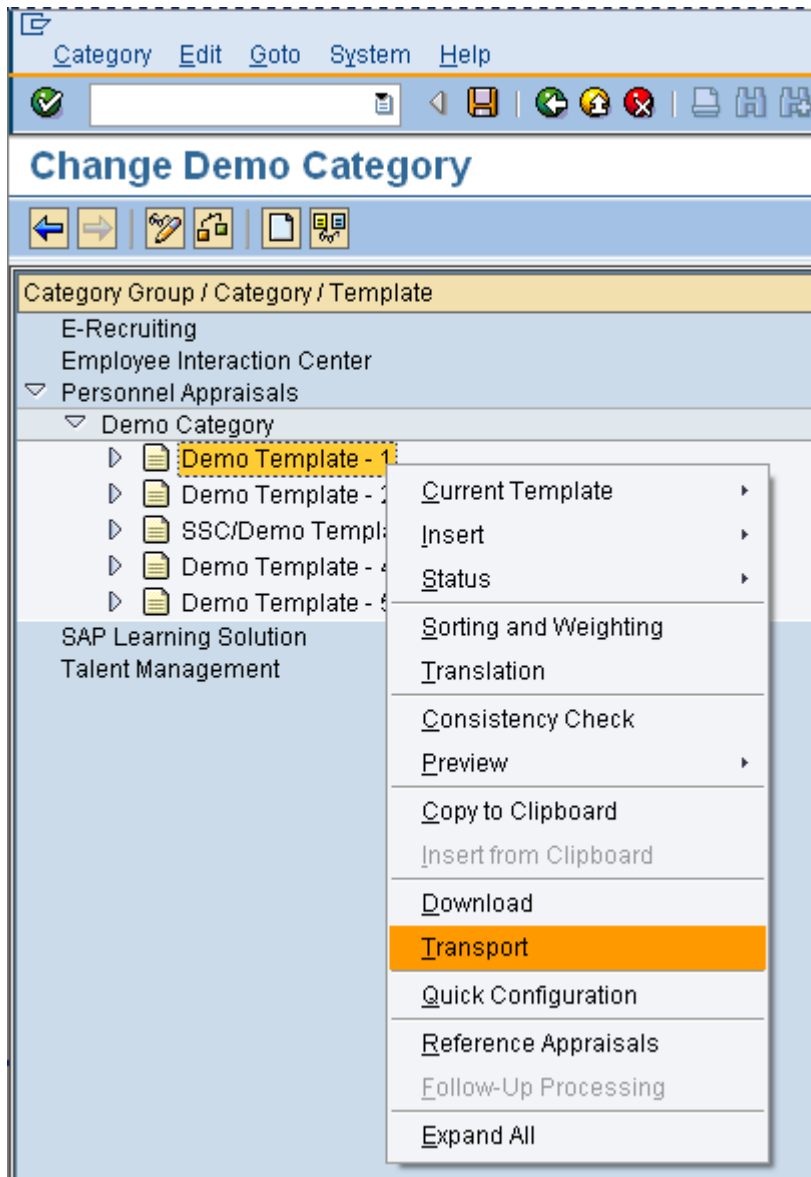
Step 4:

When you click on Transport, there will be a prompt for Customizing request. Include in your own transport request or create a new one.



Follow the standard procedure for transport. We have now transported the Category. Now in the same way, we can transport the Appraisal Template.

Right click on the Appraisal Template to be transported, click on transport and include in a transport request.



Advantages of manual transports:

1. User friendly – Easy to transport
2. Can transport all the configuration in one go
3. The IDs for the Appraisal Templates are same in the source and target systems. This is especially important if there is an active integration with ECM (Enterprise Compensation Management).

Disadvantages of manual transports:

1. Have to make sure that the target system does not have any additional pre-existing configuration. In case there is an existing Appraisal Template in the target system with the same ID, it will lead to inconsistency.




## Automatic Transport

If we turn on the automatic transport option, the system will prompt for a transport request every time a change is made to the configuration.

The setting for turning on the automatic transport option is made in SPRO → Personnel Management → Organizational Management → Transport → Set Up Transport Connection

For automatic transport, the option to be selected is blank.





**Change View "Set up PD Transport Connection": Overview**

Documentation   

Group	Sem. abbr.	Value abbr.	Description
TRSP	CORR	X	Transport Switch (X = No Transport)
TRSP	STOBJ		Redefinition: Standard Transport Object
TRSP	WFOBJ		Redefinition: Workflow Transport Object

HR Transport Link: Automatic Transport 3 Entries

Short Descript.
Automatic Transport (When Customizing Client)
T Transport via Object Lock (RHMOVE50)
X No Transport

Advantages of automatic transports:

1. The source and the target systems are completely in-sync at all times
2. The IDs for the Appraisal Templates are same in the source and target systems. This is especially important if there is an active integration with ECM (Enterprise Compensation Management).

Disadvantages of automatic transports:

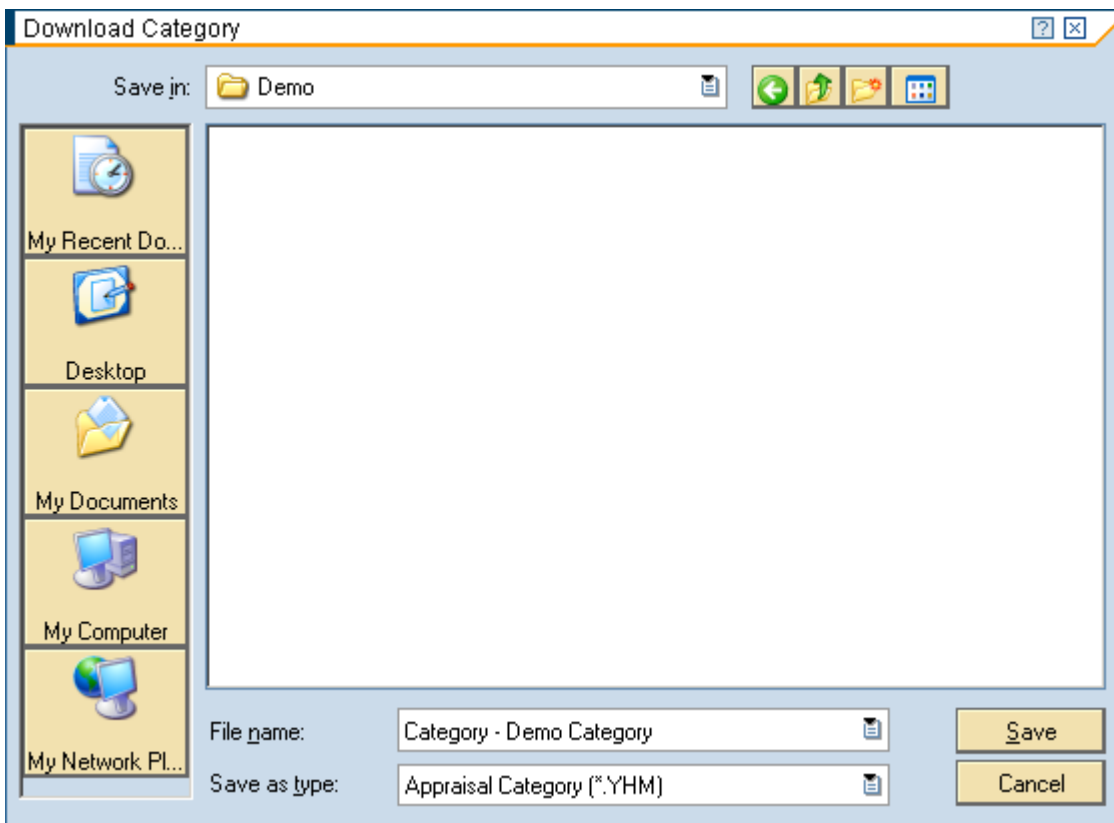
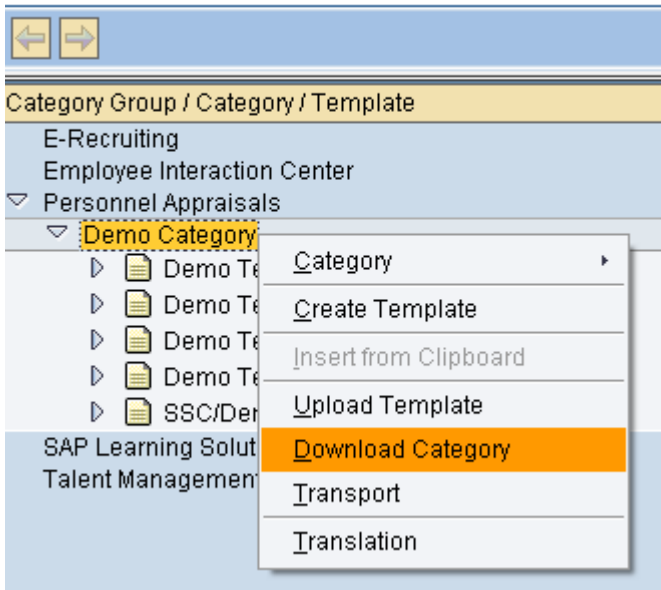
1. The automatic transport is turned on for all the PD and OM objects including Jobs, Positions and Org Units. So when we create any object, for example, position in Development systems, we will be prompted for a transport.

## Download and Upload

In this option, we can simply download the Category and the Appraisal Templates to the hard drive of the laptop/PC and then upload them in the target system.

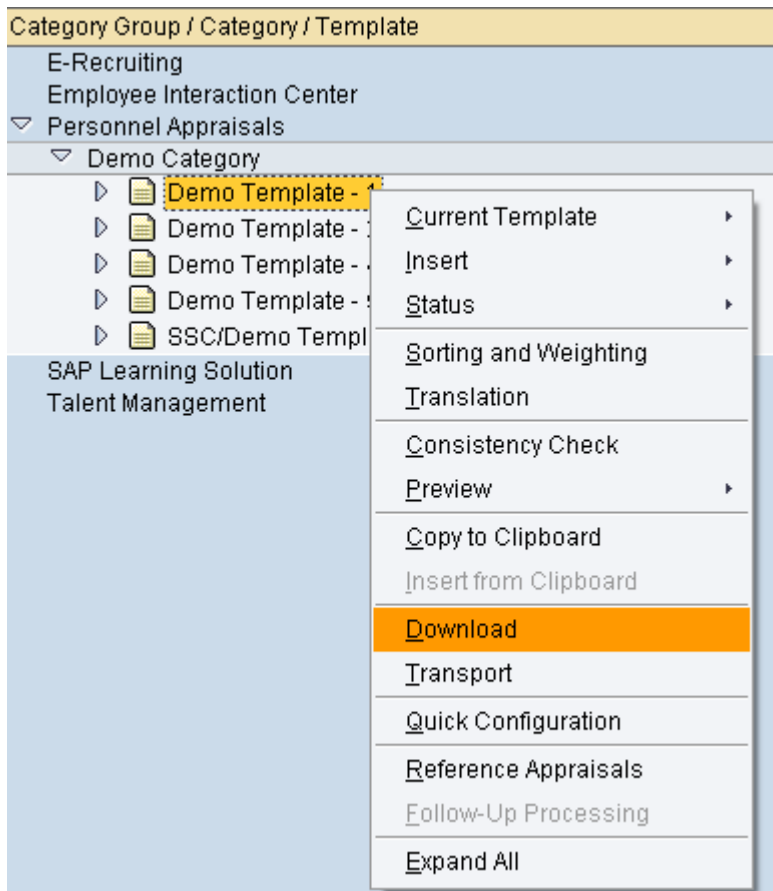
Step 1: Right click on Category to be transported, click on download, and select the path where the file is to be saved. All this is done in the source system.

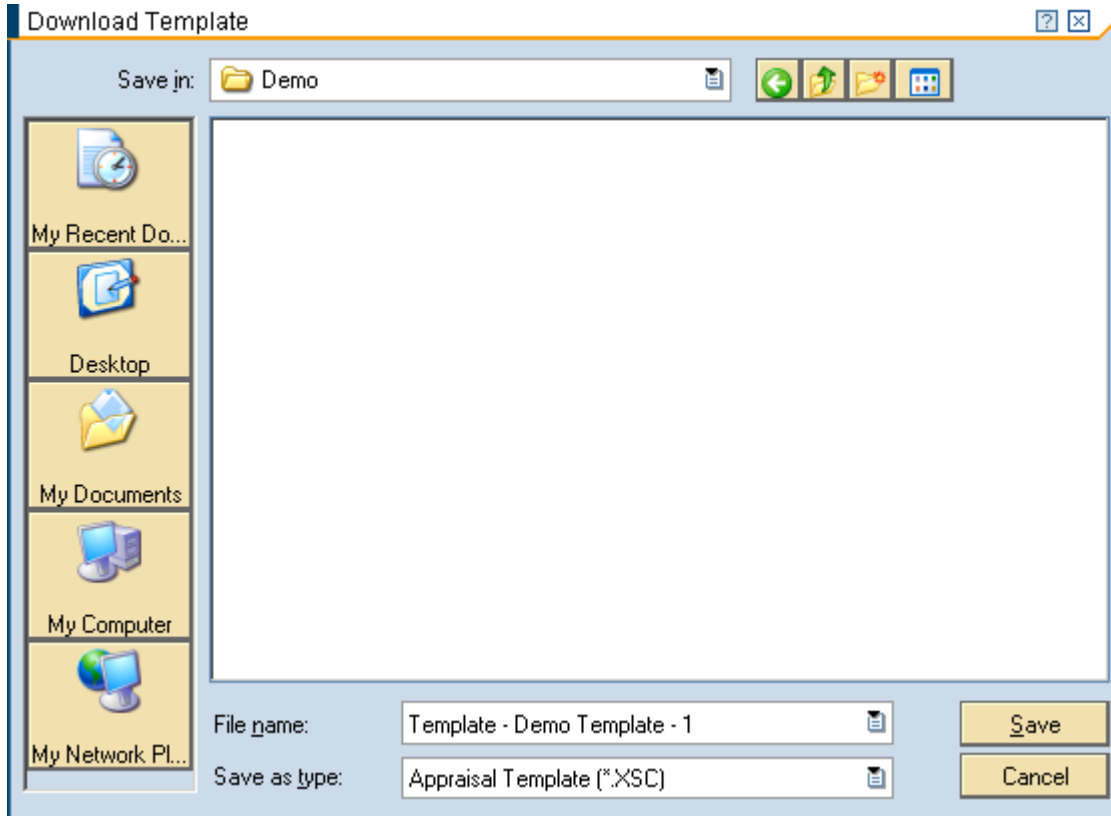
### Appraisal Template Catalog



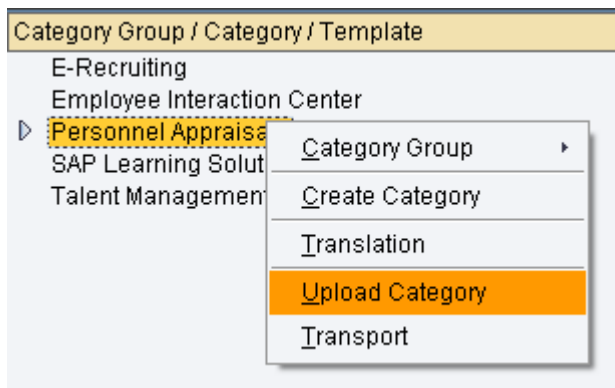


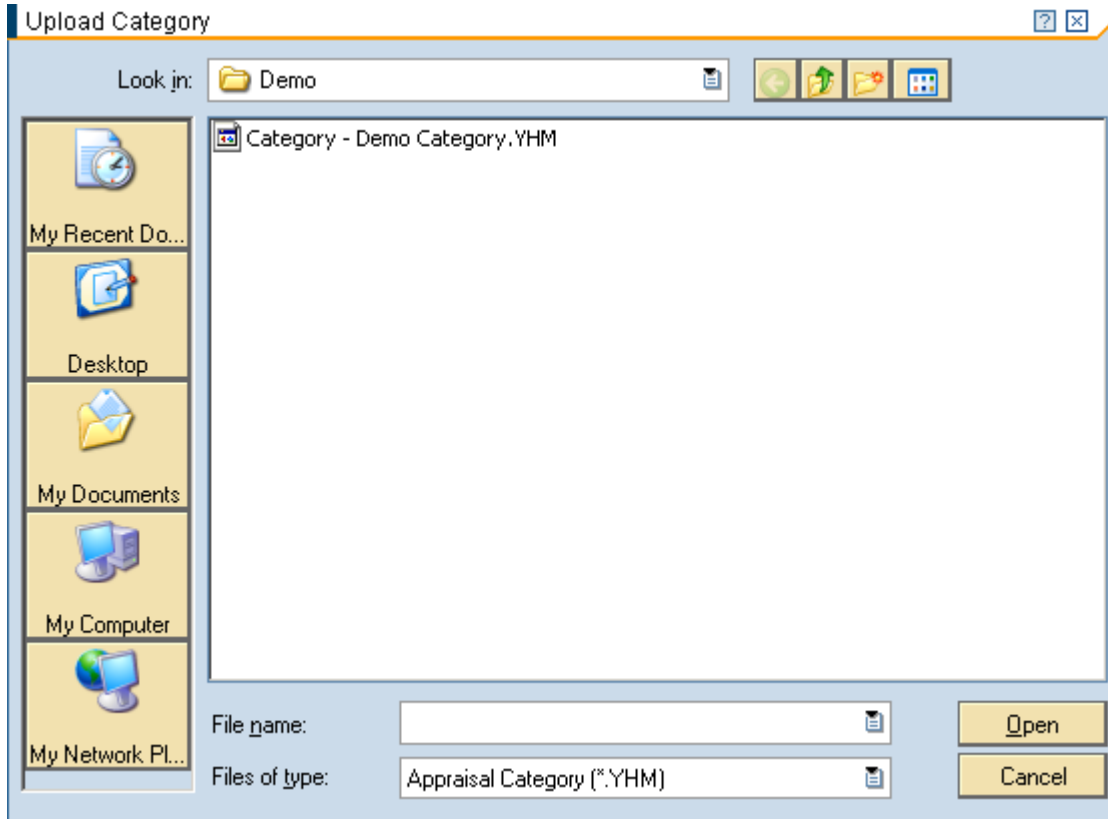
Similarly, download the Appraisal Template.



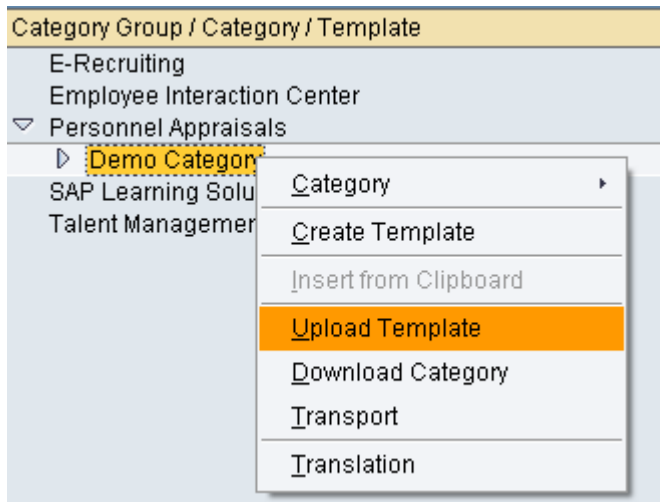


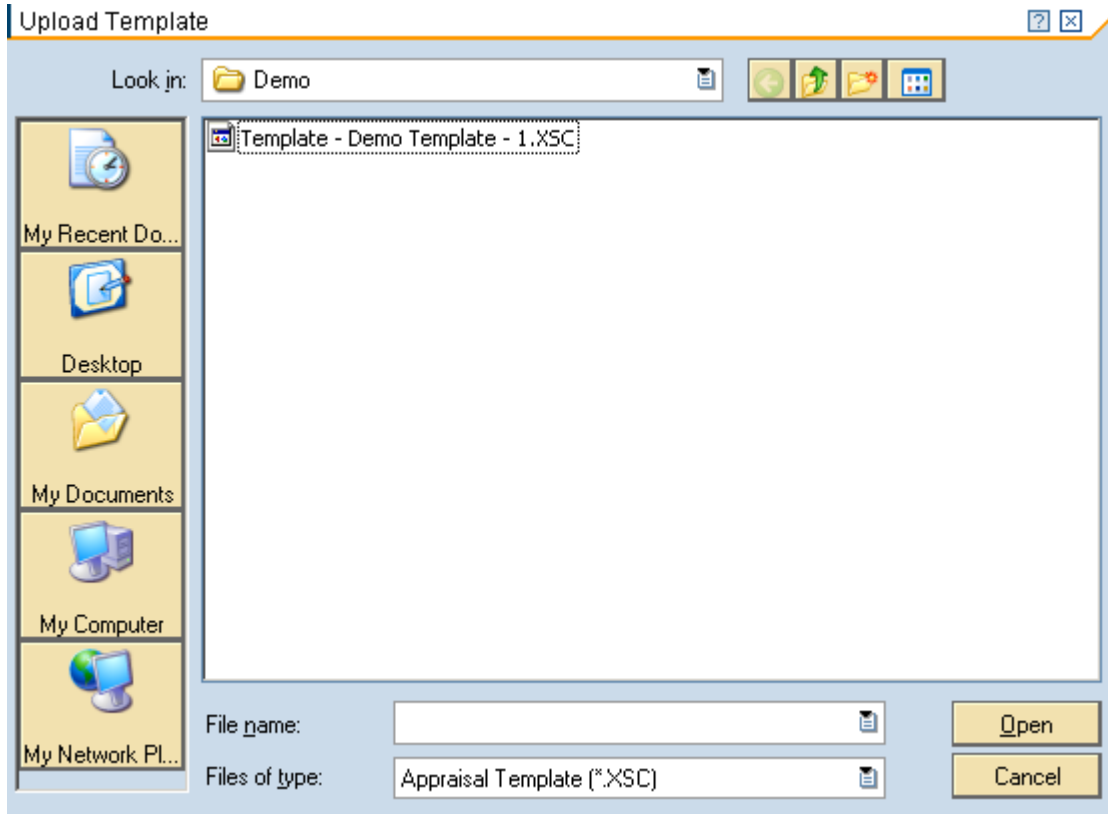
Step 2: Go to the target system. For uploading the Category, right click on Category Group and click on 'Upload Category'. Select the path where the file has been saved.





Step 2: In a similar way, upload the Appraisal Template by right clicking on Category and clicking on 'Upload Template'. Select the path where the file has been saved.





Advantages of downloading and uploading:

1. User friendly – Easy to transport
2. Can transport all the configuration in one go.

Disadvantages of downloading and uploading:

1. The IDs for the Appraisal Templates can be different in the source and target systems. This is especially important if there is an active integration with ECM (Enterprise Compensation Management). If you are planning to have active integration with ECM, DO NOT use this method.

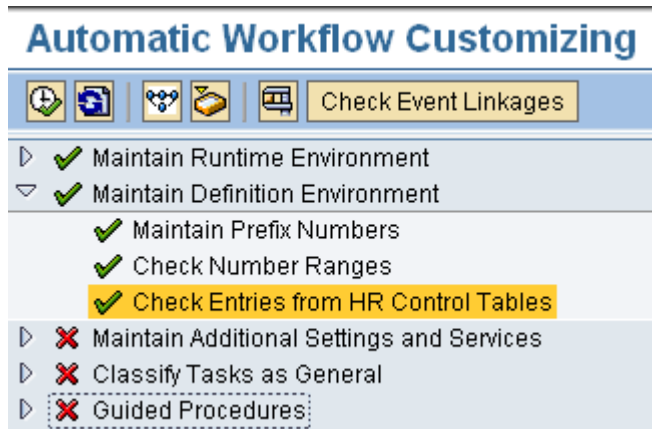
**Note:** Please make sure that you download and upload the Category first and the Appraisal Template later. Transporting the Appraisal Template before transporting the related Category will lead to inconsistencies.

## Troubleshooting

There may be problems with any of these transport methods. Following are the common troubleshooting steps which take care of most of the transport issues:

1. Make sure that you transport in the right sequence: Category and then the associated Appraisal Templates.
2. In case of automatic and manual transports, make sure that the target system is clean. There should not be any existing data with the same IDs.
3. In some cases, only some of the tables are transported. The template may be transported but may not be associated with the Category even though the sequence of transport (First Category and then the Appraisal Template) is correct. In such cases, it may make sense to check Entries from HR Control Tables.

Go to transaction SWU3. Go to Maintain Definition Environment → Check Entries from HR Control Tables. Make sure the checkbox is green.



If the checkbox is red, run the report RHSOBJCH and reconcile OBJS with HR Database tables.

## Related Content

[Objective Setting and Appraisal](#)

[Appraisal Catalog](#)

[Appraisal Template](#)

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