

# Configuration of Actions in Personnel Management – SAP HCM



## Applies to:

SAP release ECC 5.0 onwards. For more information, visit the [Enterprise Resource Planning homepage](#).

## Summary

This article explains the steps to configure the personnel actions, action types, info groups and also some necessary features used during configuration of actions in Personnel Management.

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**Created on:** 20 July 2009

## Author Bio

Naveen Bhukta is working in Tata Consultancy Services since 2 years and has a wide experience in SAP HCM modules like Organizational Management, Personnel Management, Time Management, Enterprise Compensation Management.

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## Introduction

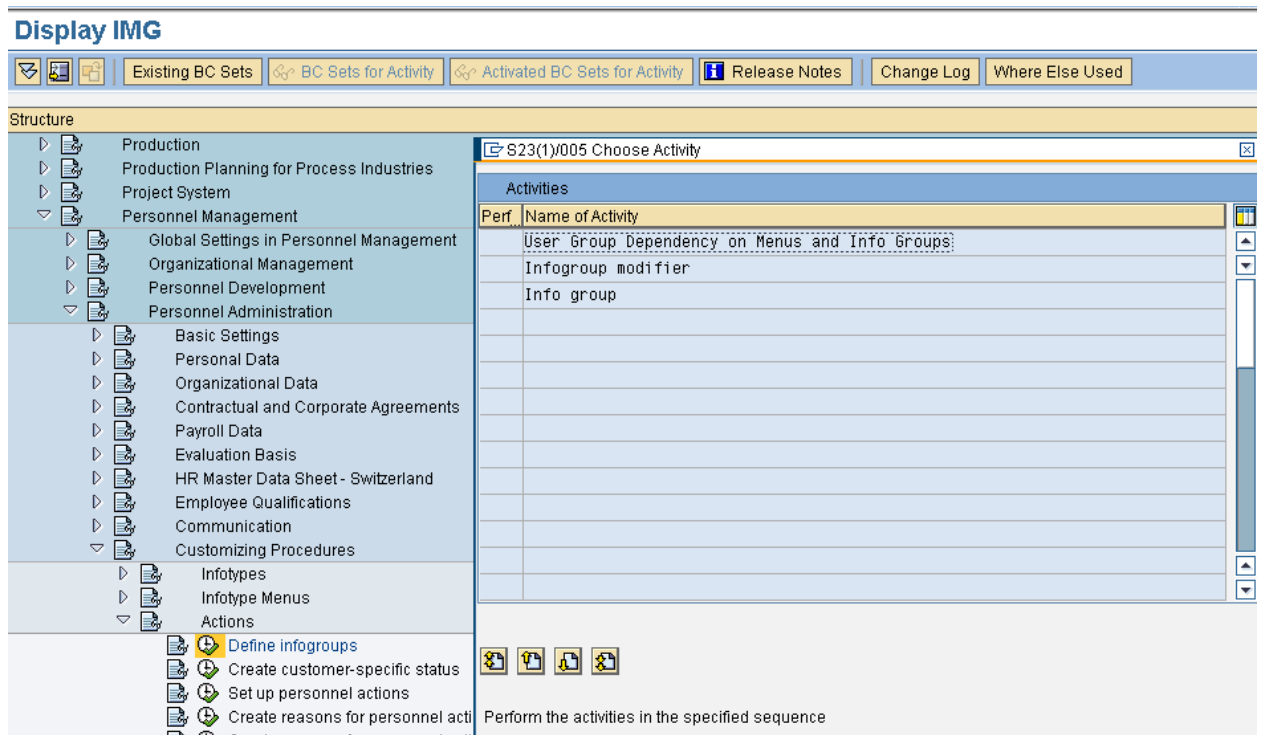
An “Info group” contains list of actions which are executed in sequence when an action is run for an employee via PA40 (Personnel Actions) or Fast entry (PA42).

The info groups can be defined so that they are dependent on the user group (user parameter "UGR"). If there are no entries for an info group for the user's user group or if the user has not maintained their user group, then the info group is determined using the reference user group.

## Steps to Configure the Personnel Actions

Below are the detailed steps to configure the Info group for a particular action and the corresponding action menu and action types.

1. SPRO→Personnel Management→Personnel Administration→Customizing Procedures→Actions→Define Info groups



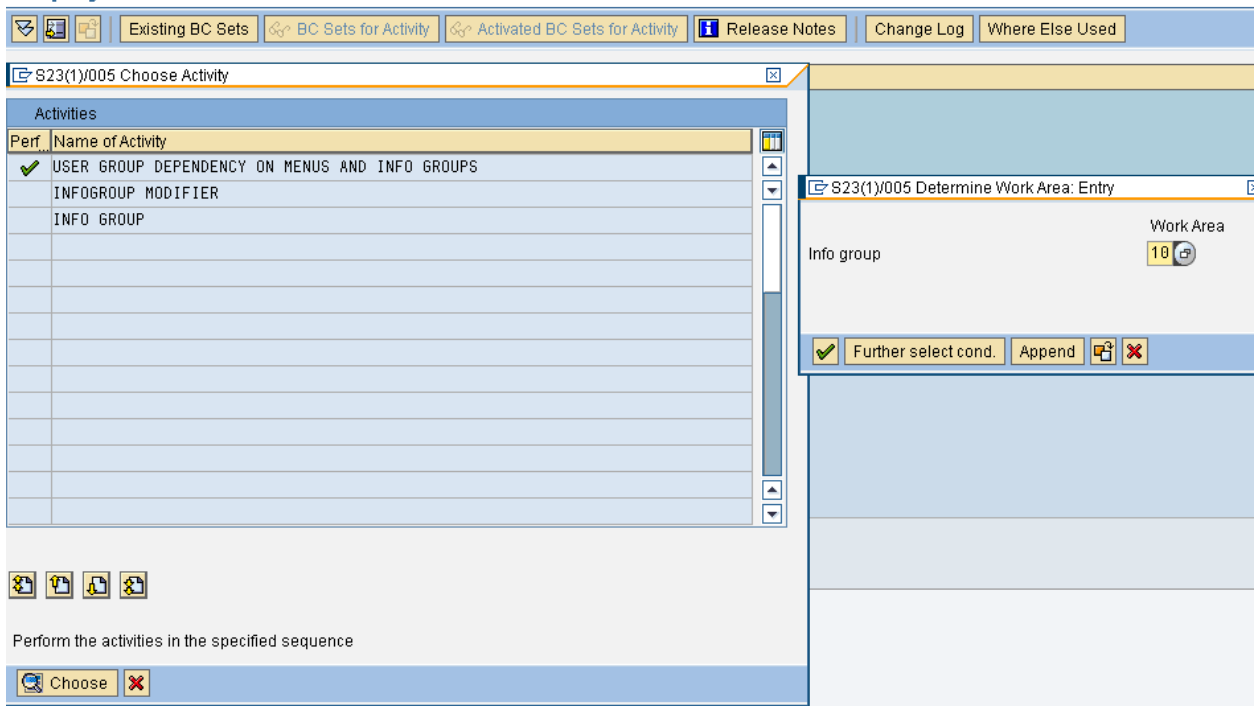
- Double click on User Group Dependency on Menus and Info Groups and define the needed action in your organization and check the box “User group dependent (UGR)” and if UGR is not set in the user defaults, then specify the reference user group

The screenshot shows the SAP HCM configuration interface for 'User Group Dependency on Menus and Info Groups'. The title bar indicates 'Change View "User Group Dependency on Menus and Info Groups": Overview'. Below the title bar, there is a toolbar with various icons and a search field. The main area displays a table with columns: Menu, Text, User-dep., Reaction, and Ref. The table lists 24 menu items, with the first row (Menu 03, Text 'Payroll Hire Event') highlighted in yellow. The 'User-dep.' column contains checkboxes, most of which are checked. Below the table, there is a 'Position...' button and the text 'Entry 1 of 63'. The SAP logo is visible in the top right corner of the window.

Menu	Text	User-dep.	Reaction	Ref.
03	Payroll Hire Event	<input checked="" type="checkbox"/>		00
10	Hiring	<input checked="" type="checkbox"/>		99
20	Freeze Expatriate	<input checked="" type="checkbox"/>		99
25	Auto Terminations	<input checked="" type="checkbox"/>		01
30	Payroll Info Event	<input checked="" type="checkbox"/>		00
32	Leave of Absence with Pay	<input checked="" type="checkbox"/>		99
35	Leave of Absence without Pay	<input checked="" type="checkbox"/>		99
36	Return from Leave	<input checked="" type="checkbox"/>		99
37	WCB Absence	<input checked="" type="checkbox"/>		01
40	Interview information	<input checked="" type="checkbox"/>		99
41	Assessment information	<input checked="" type="checkbox"/>		99
42	Vacancy assignment	<input type="checkbox"/>		99
43	New application	<input checked="" type="checkbox"/>		99
44	Additional Recruitment Information	<input checked="" type="checkbox"/>		99
45	Org. assignment change	<input checked="" type="checkbox"/>		99
46	Additional data entry	<input checked="" type="checkbox"/>		99
47	Initial entry of basic data	<input checked="" type="checkbox"/>		99
48	Transfer applicant data	<input type="checkbox"/>		00
49	Transfer other data	<input type="checkbox"/>		00
4A	Display appl.data	<input type="checkbox"/>		00
4B	Display appl.data	<input type="checkbox"/>		00

3. Double click on Info group and enter the relevant info group which you configured in the previous step. Let's take the simple action "Hiring". Press Enter.

### Display IMG



4. Click on new entries in this screen and enter the following details
  - A. User Group
  - B. Sequence number – this is the number assigned to each info type which is part of that info group.
  - C. Operation – Operation defines the editing mode which should be used to process the info type in an action. There are 8 kinds of operations provided by SAP and you may use anyone of them as per the requirement.

Copy (COP): When you use the copy operation, the system proposes the start date for the existing record.

Delete (DEL): If you use this operation in an action, it would delete the latest record for that info type

Display (DIS): An info type is just displayed if this operation is used.

Lock/unlock (EDQ): This will lock the latest info type records.

Create (INS): This operation will create an info type record if there does not already exist a record with the same subtype. It makes sense to use this operation for an initial entry action.

Delimit (LIS9): This operation will delimit the previous record and creates a new record effective the next day.

Change (MOD): This operation will open the info type for maintenance in change mode

INSS – This operation is used when there is a really a need of a create action even though a record already exists. When an additional family member is added, then the system needs to create a new record in IT0021 – Family member/dependents even though a record already exists.

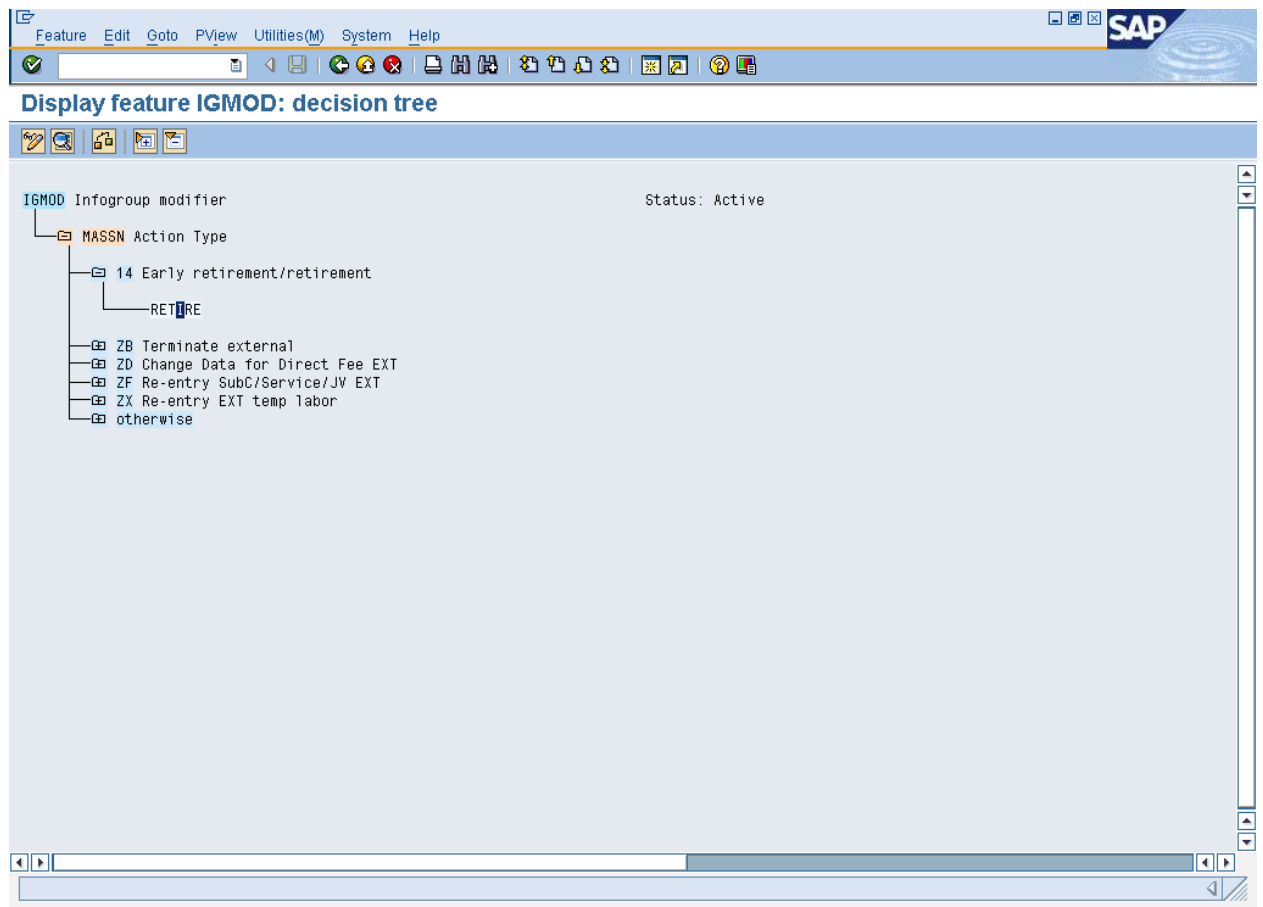
- D. Info type: Enter the info type which needs to appear in the action sequence
- E. Subtype: You may also specify the subtype of an info type in this field and it will be defaulted while you run the action.

The screenshot shows the SAP HCM 'Change View Info Group' interface. The title bar reads 'Change View "Info Group": Overview'. The 'Info group' is set to '10 Hiring'. The 'User group-dependent' checkbox is checked, and the 'Reference user group' is '99'. Below this is a table with the following columns: User group, Infogrmodi., No, Operation, Infotype, S, Infotype text, and Subt... The table contains 13 rows of data:

User group	Infogrmodi.	No	Operation	Infotype	S	Infotype text	Subt...
01		10	INS	0001		0001 Organizational Assignment	
01		12	DEL	0006		0006 Addresses	9
01		15	INS	0002		0002 Personal Data	
01		20	INS	0006		0006 Addresses	1
01		30	INS	0016		0016 Contract Elements	
01		32	INS	0033		0033 Statistics	8
01		33	INS	0033		0033 Statistics	Z0
01		34	INS	0033		0033 Statistics	Z1
01		35	INS	0007		0007 Planned Working Time	
01		40	INS	0041		0041 Date Specifications	
01		45	INS	0008		0008 Basic Pay	
01		75	INS	0014		0014 Recurring Payments/Deductions	

At the bottom of the interface, there are buttons for 'Infogroup modifier' and 'Position...', and the text 'Entry 1 of 1 562'.

- F. IGMOD: This is the short form for info group modifier. IGMOD is basically used if you need different kinds of info types to appear in the action sequence for the same personnel action to different employees belonging to the same UGR but to 2 different personnel areas for example. This can also be queried on Employee groups, employee subgroups, company code, personnel subarea etc.



## Change View "Info Group": Overview

Info group:  Withdrawal
 
 User group-dependent:   
 Reaction:   
 Reference user group:

User group	Infogrmodi.	No	Operation	Infotype	S	Infotype text	Subt.
	01		01 INS	9205		9205 Exit Interview Details	
	01		05 COP	0001		0001 Organizational Assignment	
	01		10 INSS	0015		0015 Additional Payments	
	01		20 LIS9	0014		0014 Recurring Payments/Dedu	
	01		30 LIS9	0011		0011 External Transfers	
	01 RETIRE		01 COP	0001		0001 Organizational Assignment	
	01 RETIRE		10 INSS	0015		0015 Additional Payments	
	01 RETIRE		20 LIS9	0014		0014 Recurring Payments/Dedu	
	01 RETIRE		30 LIS9	0011		0011 External Transfers	
	02		01 INS	9205		9205 Exit Interview Details	
	02		05 COP	0001		0001 Organizational Assignment	
	02		10 INSS	0015		0015 Additional Payments	
	02		16 LIS9	0014		0014 Recurring Payments/Dedu	5050

Entry 1 of 704

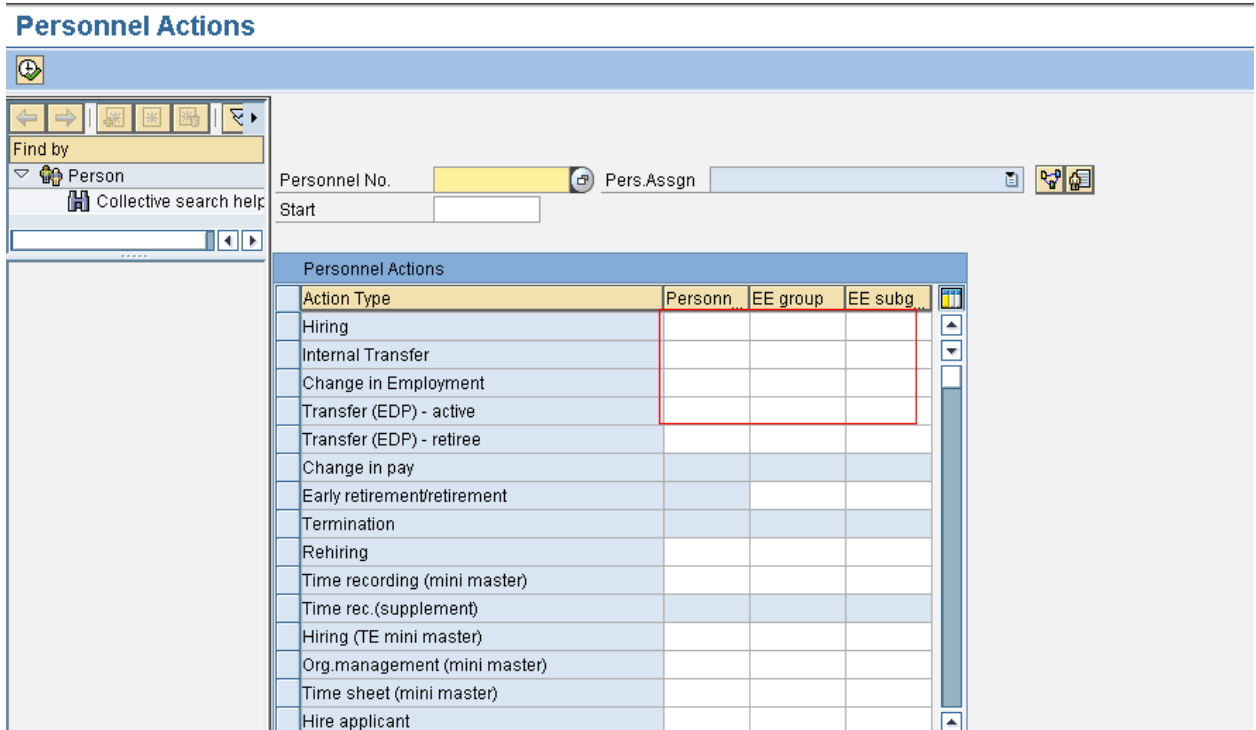
Now the info group 84 is assigned to the action type 14 in the SPRO node "Personnel action types". Also check step 7, point F for more clarity







- E. There are 4 input fields for selection: Personnel Area, personnel sub area, employee group, employee subgroup. If you check the boxes, then they are available for input on the PA40 screen when you run the action and these values will be appearing in IT0000 when you run the action.

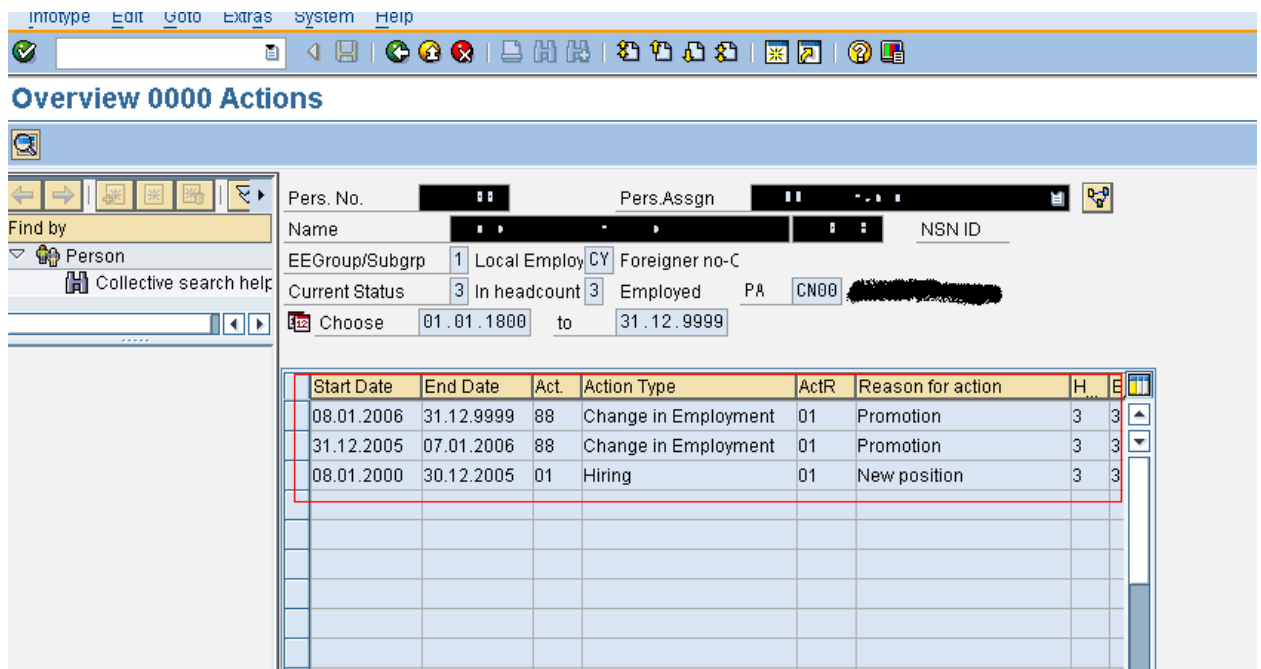


- F. Info group Number: Assign the infogroup number which you configured previously in step 4. Accordingly when you run a hiring action, all the infotypes which are part of the infogroup 10, will be run as part of the action sequence.

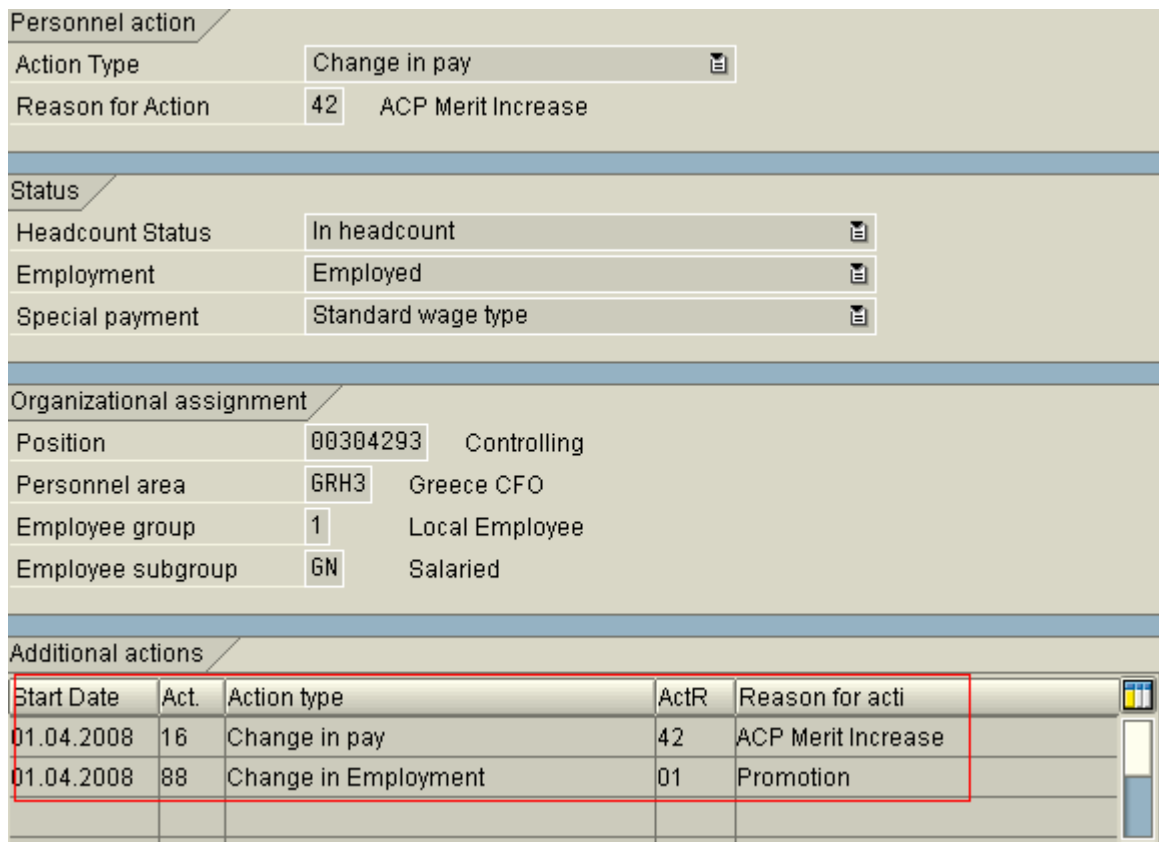
### Change View "Personnel Action Types": Overview

Actio	Name of Action Type	FC	Hea	Empl	Spec	Check	P	PA	E	ES	IG	D	U	U
01	Hiring	1	3	3	1	MSN99	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
02	Internal Transfer	0				MSN99	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	82		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
06	Transfer (EDP) - active	1		3	1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- G. Indicator U000: This will store the action type when you run a personnel action via PA40.



- H. Indicator U0302: Check this checkbox so that if there are more than one action performed for an employee on the same day, the additional actions get stored in IT0000 additional actions section and as well as in IT0302. Also if you run any action, it is then stored in additional action section.



- Execute the node “Create reasons for personnel actions”. Here you can configure different reasons which appear in IT0000 field “Reason for action”. The configuration of these reasons is based on your client’s requirement.

## Change View "Reason for Action": Overview

Action	Name of Action Type	Act.Reason	Name of reason for action
01	Hiring	01	New position
01	Hiring	02	Replacement
01	Hiring	03	Merger / Acquisition
01	Hiring	04	Transfer from another country
01	Hiring	05	Transfer from group company
02	Internal Transfer	01	Promotion within BG/LU
02	Internal Transfer	02	Demotion within BG/LU
02	Internal Transfer	03	Lateral within BG/LU
02	Internal Transfer	04	Temp. assignm. within BG/LU
02	Internal Transfer	05	Restructuring within BG/LU
02	Internal Transfer	06	Change in Employee Data
06	Transfer (EDP) - active		
06	Transfer (EDP) - active	01	With DUEVO notification
07	Transfer (EDP) - retiree		
10	Termination	01	Voluntary
10	Termination	02	Involuntary
10	Termination	05	Common Agreement

## Display 0000 Actions

Pers.No. [redacted] Pers.Assgn [redacted]

Name [redacted]

EEGroup/Subgrp 1 Local Employ CY Foreigner no-C

Current Status 3 In headcount 3 Employed PA [redacted]

Start 08.01.2000 to 30.12.2005 Chng 06.09.2000 [redacted]

**Personnel action**

Action Type Hiring

Reason for Action 01 New position

**Status**

Headcount Status In headcount

Employment Employed

Special payment Standard wage type

**Organizational assignment**

Position 00003047 XY TEST 2

Personnel area CN00 China NOK (NCIC)

Employee group 1 Local Employee

Employee subgroup CY Foreigner no-OT,13m

**Additional actions**

S23(3)005 Reason for Action

Action Type 01

Name of action type Hiring

ActR	Name of reason for action
01	New position
02	Replacement
03	Merger / Acquisition
04	Transfer from another country
05	Transfer from group company

- Execute the node “Change Action Menu”. This same action menu will be displayed in PA40 screen.

### Display IMG

The screenshot shows the SAP IMG interface for the transaction S231Y005 'Choose Activity'. The left pane displays a navigation tree under 'Personnel Management' with the 'Actions' node selected. The right pane shows a table with the following data:

Perf	Name of Activity
	User Group Dependency on Menus and Info Groups
	Action menu

Below the table, there are icons for 'Define infogroups', 'Create customer-specific status', 'Set up personnel actions', 'Create reasons for personnel actions', and 'Set Up Workflow-Connection for Country'. A 'Choose' button is visible at the bottom of the right pane.



11. Then double click on the Action Menu and enter the menu as 01- actions.

**Display IMG**

Existing BC Sets | BC Sets for Activity | Activated BC Sets for Activity | Release Notes | Change Log | Where Else Used

S23(1)005 Choose Activity

Structure

- Project System
  - Personnel Management
    - Global Settings in Personnel Management
    - Organizational Management
    - Personnel Development
    - Personnel Administration
      - Basic Settings
        - Personal Data
        - Organizational Data
        - Contractual and Corporate Agreements
        - Payroll Data
        - Evaluation Basis
        - HR Master Data Sheet - Switzerland
        - Employee Qualifications
        - Communication
        - Customizing Procedures
          - Infotypes
          - Infotype Menus
          - Actions
            - Define infogroups
            - Create customer-specific status
            - Set up personnel actions
            - Create reasons for personnel action
            - Create reasons for personnel action
            - Create reasons for personnel action
            - Set Up Workflow-Connection for Country Reassignments
            - Change action menu
            - Define reasons for personnel action

Activities

Perf	Name of Activity
<input checked="" type="checkbox"/>	USER GROUP DEPENDENCY ON MENUS AND INFO GROUPS
<input checked="" type="checkbox"/>	ACTION MENU

S23(1)005 Determine Work Area: Entry

Work Area: M

Menu type: M

Menu: 01 S23(1)005 Infotype menu

Menu type M

Menu	Text
01	Actions
L4	Buyer
TP	Travel planning actions
TR	Trip costs actions

Further select cond. | Append | Choose

Perform the activities in the specified sequence



- Based on the user group (UGR), assign the action type which should appear in the action menu of PA40.

The screenshot shows the SAP HCM 'Change View Action Menu: Overview' interface. The menu is set to '01 Actions'. The 'User group-dependent' checkbox is checked, and the 'Reference user group' is set to '99'. A table lists various action types with their user groups and names.

User group	No Action	Name of Action Type
00	14 54	one sheet (mini master)
00	15 62	Hire applicant
00	30 40	Retirement (Civil servant)
00	31 41	Death of retiree
00	32 42	Incl. surviving deps.' pension
00	33 YY	Reorganizing
01	10 01	Hiring
01	15 12	Rehiring
01	27 88	Change in Employment
01	28 89	Nav-Hiring
01	30 16	Change in pay
01	35 32	Leave of Absence with pay
01	40 35	Leave of Absence without pay

Position... Entry 14 of 1 246

- Now you have completed creating an infogroup , personnel action type and also designed the action menu which should appear for that UGR. You may now go to PA40 and run the action which you have created.

**Personnel Actions**

Find by  
 Person  
 Collective search help

Personnel No.  Pers.Assgn   
 Start

Action Type	Personn...	EE group	EE subg...
Hiring			
Rehiring			
Change in Employment			
NavHiring			
Change in pay			
Leave of Absence with pay			
Leave of Absence without pay			
Return from Leave			
Termination			
Early retirement/retirement			
Create Inpatriate			
Return from Assignment			
NavHiring			

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