

Training and Event Management (PE)



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Training and Event Management (PE)

Training and Event Management (PE)

Purpose

The *Training and Event Management* component has a wide range of powerful functions to enable you to plan and manage all kinds of business events from training events to conventions simply and efficiently.

Its flexible reporting and appraisal functions provide you with important decision support feedback to ensure that the business events you offer are both high quality and effective.

Training and Event Management is an integral part of SAP HR and has interfaces to all of the relevant SAP application components, making it a basis for extending and updating your employees' skills and knowledge. Integration with *Personnel Development* lets you convert training proposals directly into bookings for employees with qualification deficits or needs.

The connection to the *SAP Knowledge Warehouse* gives you direct access from the *Training and Event Management* application and its self-service applications to a variety of training materials (self-teach materials and so on).

Training and Event Management contains an extensive range of functions that are user-friendly and intuitive. The application's graphical user interface greatly facilitates navigation and operation of the system.

Integration

If you use *Training and Event Management* integrated with other SAP components, there is a direct exchange of data via the various interfaces, allowing efficient data maintenance in *Training and Event Management*.

Training and Event Management can be integrated with the following application components:

Component	Functions
<i>Organizational Management</i>	Organizational units can be booked as attendees and can organize business events
<i>Personnel Administration</i>	Persons from the HR master data record can be booked as attendees or as instructors
<i>Time Management</i>	Attendance records are stored and compatibility/availability checks can be carried out for internal employees and instructors
<i>Personnel Development</i>	Qualifications can be checked and transferred to attendees. Users can also use the appraisal functions of the Personnel Development component
<i>Cost Accounting</i>	Attendance and instructor fees can be settled using Internal Activity Allocation
<i>Sales and Distribution</i>	Attendance fees can be billed; customers and contact persons can be booked as attendee types
<i>Materials Management</i>	Materials from the Material Master can be reserved as resources for business events; purchase requisitions and material reservations can be generated

<i>SAP Knowledge Warehouse</i>	Info objects ((training materials, documentation, or videos) can be displayed directly from <i>Training and Event Management</i> and its Self-Service applications
<i>R/3 Appointment Calendar</i>	When employees are booked as attendees or instructors for events, these appointments can be automatically generated in the R/3 Appointment Calendar

Integration with these components is optional. You can use *Training and Event Management* as a standalone option without availing of the advantages offered by such integration.

Features

Training and Event Management provides you with an extensive range of powerful functions for every stage of event management; preparation, planning, and execution.



Business Event Preparation

- Create all of the necessary master data (such as resources)
- Set up a hierarchically structured business event catalog

Business Event Catalog

- Determine demand for events and plan event dates based on demand
- Create and plan business event dates
- Manage resources
- Allocate resources automatically
- Lock resources

Training and Event Management (PE)

- Calculate business event costs and propose prices
- Budget function
- Cancel business events
- Create a business event brochure

Day-to-Day Activities:

- Process all types of booking activities: book, prebook, replace, rebook, and cancel attendance (levy cancellation fees optionally)
- Prioritize bookings
- Book individual and group attendees
- Check attendees for attendance prerequisites and time conflicts etc.
- Output correspondence automatically or manually
- Use standard letter/mail merge functions
- Use multiple correspondence templates

Activity Allocation and Billing

- Perform actual cost transfer posting for event costs
- Perform internal activity allocation for attendance fees
- Perform internal activity allocation for instructor function
- Billing
- Create credit memos

Recurring Activities

- Generate attendance lists
- Output confirmation of attendance notifications
- Appraise attendees
- Appraise business events
- Follow up business events (e.g. transfer qualifications for successful attendance)

Reporting:

- Request reports for all relevant data on attendance, business events, and resources

Cross-Application Usability Functions:

- Direct connection to Microsoft Word for all correspondence and publications (such as event brochure, attendance lists, or correspondence).
- [Dynamic menus \[Page 16\]](#) offer you the same functions for creating and maintaining objects as are available in the main menu for all of the important functions. The advantage of the dynamic menus is that the data you create and maintain is presented in a clearly structured way in the form of a business event hierarchy, giving you a clear overview of the existing objects.

Web Self-Services:

Training and Event Management (PE)

You can provide access to the core functions in the day-to-day activities of *Training and Event Management* via the Employee Self-Services (ESS), such as:

- *Training Center* (where employees can display the current training offering and book themselves for events or submit attendance requests where relevant)
- *My Bookings* (where employees can display their own booking data and rebook or cancel their own attendance bookings)

The Employee Self-Services provide user-friendly and intuitive functions. They can be integrated with approval workflows if required. An added advantage is the option of integrating an external search engine to accelerate the search for business events.

Dynamic Menus

Dynamic Menu

Definition

Training and Event Management has seven dynamic or data-driven menus. They are *dynamic* in the sense that data you create in one menu is automatically updated in the other menus. This data is immediately accessible and ready for editing.

There is a dynamic menu for each of the major function areas in event management:

- [The dynamic business event menu \[Page 29\]](#) where you create and change business events and manage resources.
- [The dynamic attendance menu \[Page 31\]](#), where you carry out all booking activities, handle manual correspondence, and request correspondence reports.
- [The dynamic information menu \[Page 252\]](#) where you can request all of the standard reports for business events, attendance, and resources.
- [The dynamic planning menu \[Page 36\]](#) where you can plan and schedule the required number of business events based on the demand that exists for them.
- [The dynamic tool menu \[Page 37\]](#) where you can maintain multiple infotypes at the same time and translate the objects used in *Training and Event Management*.
- [The dynamic resource menu \[Page 39\]](#) where you can manage the resources and resource types used in *Training and Event Management*.
- [The master data catalog \[Page 91\]](#) where you can create and change the objects of *Training and Event Management* in a clearly structured environment, and create relationships with existing objects.

Use

The data-driven menus provide you with an alternative means of creating and maintaining objects in *Training and Event Management*. They give you direct access to the individual functions of the application, displaying all of the objects required for editing.

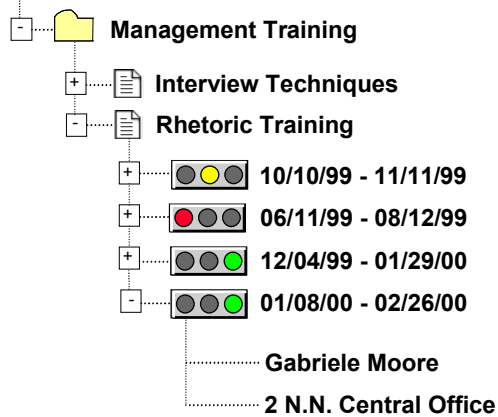
What is special about the dynamic menu concept is that it lets you access and execute all of the *Training and Event Management* functions in the hierarchically structured event catalog. Data maintained in one dynamic menu is immediately updated and accessible in all of the other dynamic menus.

The structured interface of the dynamic menus allow simple and intuitive access to the extensive functions of *Training and Event Management*. They ensure that data maintenance and administration is swift, efficient, and easy.

Structure

A dynamic menu might be structured something like this:

Current Plan 10/01/1999 - 03/01/2000



Depending on what menu you are working in, the objects that can be edited are structured hierarchically, such as, the business event hierarchy in the *business event menu*, the *information menu*, and the *attendance menu*, which includes event dates and attendees (as illustrated in the graphic).

The core functions for editing and displaying objects are available in icon form in the function bar:

Choose  to call the enhanced search function for objects in the dynamic menu structure.

Extended Search:

1. Call Extended Search

2. Select object to be found

3. Select and specify an additional search option (only for event types, attendees, and resources)

4. Search results: the dynamic menu is drilled down to the object found.


Dynamic Menus


The *Extended search function* lets you search for all of the objects that exist in the dynamic menu structure, such as business event types, business events, attendees, resources, and resource types (in the *dynamic resource menu* and *master data catalog*). To do so, you simply enter a search string. It is not necessary to expand the structure for this purpose.


There are additional search options for some objects.


- You can search for business event types using the most important objects related with them or using the descriptive text (stored in the *Description* infotype). You can also search for business event types using the search criteria such as the target group at which an event is aimed, or qualifications that it imparts (see graphic).
- You can perform an attendee type-specific search for attendees; for example, you can search for customers that are booked for events.
- You can perform an object type-specific search for resources. For example, you can search specifically for external instructors in the *master data catalog*.


If the search finds multiple objects, these are displayed in a dialog box for selection. Once you have selected an object, or if the search only finds one object, the structure is drilled down to the object concerned with the cursor positioned on it.


Choose  to go to the data screen of an object selected by the cursor.


Choose  to display all of the objects underlying a selected object. The subtree is expanded.


Choose  to collapse the subtree underlying a selected object again.

Choose  to set an initial point of access, with immediate effect. When you do so, the display only includes objects underlying the selected event group or event type.

Choose  to display the overall hierarchical structure, regardless of whether you have set a point of access or not.

Choose  to delete the initial access setting again.

Choose  to update the display once you have made changes to object data.

Choose  to change the *user-specific settings*. In addition, you can configure general settings for the display and editing of objects and specific settings for the individual dynamic menus (such as a specific planning period for the *dynamic planning menu*).

See also:

[User-Specific Settings \[Page 19\]](#)

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

User-Specific Settings

Use

You use this function to restrict the data displayed in the dynamic menus and thus narrow down the search for business events. The advantages of doing so include:

- Improved system performance.
- Clearer structure in which to edit data.


In addition, you can configure settings that apply generally for the display and editing of objects. For example, you can specify that infotypes are displayed on tab pages on the object data screen, or make settings regarding external number assignment for objects.

The settings are user-specific in that each user's choice of access is retained even after the user logs off.

You can delete the settings you have made at any time. Changes are not effective until the next time you log on (with the exception of the setting *set and delete access* which is immediately effective).

Features

You access all of the settings for the dynamic menus on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *User-Specific Settings*.

You can also access them in all the dynamic menus under *Settings* or by clicking .


You specify the dynamic menu to which your settings apply in the dialog box that appears when you call the function. The following settings are available:

Tab Page Reporting

Here you can make all of the settings that are relevant for the *dynamic information menu*:

- **Currency key:** Amounts are displayed by default in the currency you enter here if you make no other specifications on the report selection screen.
- **Display selection screen:** This entry lets you specify whether reports requested in the *dynamic information menu* are started directly or by first accessing the report's selection screen. If you want to work without accessing the selection screen, you select data for the report by positioning the cursor on the object in question when you call the report.

See also: [Selection Screen On/Off \[Page 25\]](#)

- **Standard selection screen:** When you select this option, you specify that the option *Standard selection screen* is selected by default on the selection screen of the pre-report. This screen (where available) is automatically displayed when you request reports in the *dynamic information menu*. When you then click , the report automatically takes you to the more detailed selection screen of the main report.

Tab Page Dynamic Menus:

This tab page contains other tab pages where you can make general and specific settings relevant to the dynamic menus: *business event menu*, *attendance menu*, *information menu*, *planning menu*, *resource menu*, and *tool menu*.

User-Specific Settings

Tab Page Filter:

Here you can restrict the business events that are displayed in the dynamic menus by specifying a language, a location, status, or business event attributes (such as *internal* or *external*). Multiple selection of specifications is possible. You should, however, ensure that the specifications you make can be logically combined with one another since there is a logical AND link between them. So, for example, you should not select the options *planned only* together with *followed-up only* since it is not possible to do follow-up processing for *planned* business events.

When you have made your settings, the system re-imports the structure, or substructure, on the basis of your choice.



If you want to display events held in *English* that still have places available, select *English* under *Language* and the option *available only*.

Tab Page Sorting

Here you can specify the sorting sequence in which objects (event groups, event types, and attendees) are displayed in the dynamic menus.

- **Business event group/type:** You can specify a display sorting sequence for the *object ID*, *abbreviation*, and *name* of these objects.
- **Attendees:** In the case of attendees, you can specify a sorting sequence for *attendee type*, *attendee name*, *booking priority*, *booking date*, and *organizational assignment data*.



It is not necessary to include all of the criteria. For example, it is sufficient to specify the sorting sequence *attendee type* for attendees. If you specify multiple criteria, they are displayed in the sequence you specify.

Tab Page Business Event Menus


Here you can specify the default time period for data displayed in the *business event menu*, the *attendance menu*, the *information menu*. You can also set an initial point of access:


- **Period:** You can enter a start and an end date here to determine the data selection period. If you select the option *Fixed date*, the dates you enter are retained. If you do not select this option, the start and end dates are moved forward by one day on a daily basis. (The length of the time period does not change.)
- **Initial Screen.** Here you specify that only a certain substructure is read. The display only includes objects that are related with the root object you specify. To do this, you enter the ID of the root object (event group or type). To delete this setting, simply delete the object ID from the field. When you do so, the previous structure set is read the next time you call the transaction.



It is also possible to set a point of initial access in the menu display. To do so, position the cursor on the root object in question (event group or type) and choose



Choose  to view the overall structure at any time regardless of the initial access setting. Your access choice is not deleted when you do this.

Choose  to delete the initial access setting again. When you do so, the overall structure is immediately displayed.

Tab Page Planning Menu

Here you can make the same settings for the *planning menu* as described in the section *Tab Page Business Event Menus*.

Tab Page Resource Menu

Here you can make the same settings for the *resource menu* as described in the section *Tab Page Business Event Menus*.

Tab Page Tool Menu

Here you can make the same settings for the *tool menu* as described in the section *Tab Page Business Event Menus*.

Tab Page Master Data

Here you can make specific settings for the *master data catalog* and general settings for the display and editing of objects in the dynamic menus (under *Display options*):

- *Display PC Editor*: If you select this option, you can use a text editor for entering subtypes of the *Description* infotype. If you do not select the option, only a line editor is available.
- *Display tabstrips*: If you select this option, the infotypes of an object are displayed on tab pages on the data screen of the object. In the standard system, this option is active.
- *External number ass.*: If you select this option, you can assign object IDs manually when you create new objects. In the standard system, the option is not active. In other words, internal (automatic) number assignment is set.



You specify the number ranges for your objects in Customizing for *Training and Event Management* under *Basic Settings* → *Number Range Maintenance*.

- *Display Dropdown*: If you select this option, the integrated possible entries help is available for input fields in the form of a Dropdown list.
- *Last changed by*: If you select this option, change information is automatically displayed in the *master data catalog* (such as *last changed by*).
- *Period and Initial Access*: Here you can make the same settings for the *master data catalog* as described in the section *Tab Page Business Event Menus*.

Tab Page View:

Here you can configure general settings for the display of objects and additional information in the dynamic menus:

- *With key*: If you select this option, the object IDs and object type keys are displayed in the dynamic menus.
- *With additional information*: If you select this option, additional information (such as relationships with objects in the *master data catalog*) is displayed in the dynamic menus.
- *With abbreviation*: If you select this option, the object short name is displayed in the dynamic menus.


User-Specific Settings

See also:

[Dynamic Menus \[Page 16\]](#)

Structure Access/General Overview

Use

If you do not work with the whole structure all the time, you can specify that only a particular substructure is imported. If you do so, the display only includes objects that are related with the root object upon which the cursor is positioned when you choose  or with the object you specified under *User-Specific Settings* on the tab page *Dynamic Menus* → *Business Event Menus* by entering an object ID.

The special access you define applies to all the dynamic menus.


It is user-specific in that each user's choice of access is retained, even after the user logs off.




Setting a point of access naturally improves runtimes, since the system only has to read a substructure.

Features


Set access

You select a root object (event group or event type) from which you want to access the structure and choose . The display includes all objects underlying the root object you select. This access setting is valid until you delete it again.

Delete access

You can revoke the access at any time by choosing .

General overview

From within your own special access, you can choose  to view the complete structure. Your access choice is not deleted when you do this.

See also:

[User-Specific Settings \[Page 19\]](#)


Internal and External Number Assignment

Internal and External Number Assignment

Use

When you use the dynamic menus, you can specify whether you want to use internal or external number assignment when you create objects.

Activities

The system default is internal number assignment. If you want to assign your own numbers to objects, you must activate external number assignment under *User-Specific Settings*. You access *user-specific settings* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Settings* or in the dynamic menus by choosing  in the menu bar. The settings for external number assignment are on the tab page *Master Data*.

You specify the number ranges for your objects in Customizing for *Training and Event Management* under *Basic Settings* → *Number Range Maintenance*.

See also:


[User-Specific Settings \[Page 19\]](#)

Switching the Selection Screen On and Off

Use

You use this function to determine whether reports in the dynamic *Information* menu are started from the selection screen, allowing you to specify further selection criteria, or whether the reports are started directly from the data screen of the dynamic menu.

Activities

On the *SAP Easy Access* screen in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *User-Specific Settings*, or directly in a dynamic menu choose *Settings* → *Change Settings* or . The dialog box *Change User-Defined Settings* appears.

If you want to go directly to the report's selection screen when you call a report, choose the *Reporting* tab and under *Display options*, select the option *Display selection screen*. Your settings are immediately effective.

You can deactivate settings in the same way.

See also:

[Dynamic Information Menu \[Page 252\]](#)

Object Maintenance in the Dynamic Menus

Use

The dynamic menus offer you the same functions as are available in the *Training and Event Management* main menu for creating and maintaining objects but in a more structured environment. Object maintenance in the dynamic menus is faster and more efficient in that you do not have to call the individual transactions. The hierarchical structure of the dynamic menus provides you with better overview of existing data.

Prerequisites

You must set up a structure consisting of at least one business event group and one business event type. You do so either in Customizing for *Training and Event Management* or in *Current Settings*.

You can create and maintain all other objects in the structure in the dynamic menus.

Features

- All of the functions contained in the *Training and Event Management* main menu are also available to you in the dynamic menus.
- The advantage of the dynamic menus is that the data you create is presented in a clearly structured way in the form of the business event hierarchy. The display of a business event group includes, for example, all underlying event groups, types, events, and attendees.
- Traffic light icons at the level of business event dates provide information on the availability of places on an event.
- You can switch between the *attendance menu*, the *business event menu*, and the *information menu* by choosing the corresponding menu entry, always accessing the same level of the structure as the one you leave.
- The dynamic menus are data-driven. This means that data you create in one menu is immediately available for further maintenance when you access another menu. The data does not have to be read again by the system.



For example, if you create a business event date in the *business event menu*, you can switch to the *attendance menu* and immediately book attendees for the event.

- In the *information menu*, you can request the most up-to-date reports for attendance, dates, or resources at any time.
- You can search for objects in the structure of the dynamic menus using the *Extended search help* function.
- You can sort the objects displayed according to a variety of criteria. To do so, you choose *Edit* → *Sort*.
- You can access the most important reports for the objects displayed directly under *Extras* in the menu bar.

Object Maintenance in the Dynamic Menus

- You have the option of setting your own individual initial access to the structure. Objects or substructures that do not interest you are not displayed for maintenance.



Setting a point of access naturally improves runtimes, since the system only has to read a substructure.

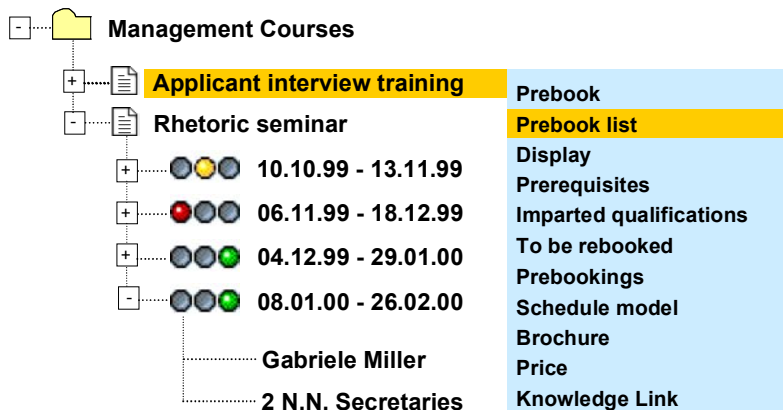
- You can control access to the structure with the authorization feature.
- The user-specific settings let you specify exactly what information you want displayed (such as *planned events* only).

See also: [User-Specific Settings \[Page 19\]](#)

Activities

To maintain objects in the dynamic menus, you simply position the cursor on the object in question and choose the required function. The most important functions can also be accessed with a right mouse click on the object. All of the functions executable in the various dynamic menus are available in the menu.

Selecting Functions with the Right Mouse Button:



In the dynamic menus, the various maintenance functions are only active for the object types for which they are allowed and possible. Functions that are not executable at a particular level are not active at that level.



In the [attendance menu \[Page 31\]](#) at the **business event type level** with the cursor positioned on a business event type, you can choose *Prebook* from the menu or with a right mouse click.

You can choose the *Book* function from the menu at this level. You can then select from all existing business events of the type in the period specified.

The *Book* function is also available at the **business event date level**, but here you can only select one specific event to edit. The system does not offer you all existing business events of a particular type for selection, only the one selected with the

Object Maintenance in the Dynamic Menus

cursor. When you choose *Book*, you immediately access the data screen. All of the relevant data is transferred to the data screen.

At the **attendee level**, the functions *Book*, *Rebook*, *Cancel*, and *Replace* are available. In *Book* mode, the system offers you all existing business events of a particular type for selection.

When you have selected a function, refer to the individual functions for more information about the procedure.

See also:

[Dynamic Menus \[Page 16\]](#)

[User-Specific Settings \[Page 19\]](#)

The Dynamic Business Event Menu

Definition

[Dynamic menu \[Page 16\]](#) where you execute the functions for creating and maintaining business event dates.

Use

In the *business event menu* you can create and edit business event dates in a structured environment. The following functions are available for event dates:

- [Creating \[Page 103\]](#)
- [Firmly booking \[Page 226\]](#) / [canceling \[Page 223\]](#)
- [Locking \[Page 125\]](#)
- [Unlocking \[Ext.\]](#)
- [Following Up \[Page 230\]](#)

In addition, you can execute all of the billing and activity allocation functions for event costs and fees.

To maintain objects in any of the dynamic menus, you simply position the cursor on the object in question and choose the required function with a right mouse click on the object or from the menu.

See also:

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

You can configure user-specific settings for data display and maintenance in the dynamic menus.

See also:

[User-Specific Settings \[Page 19\]](#)

Integration

You can branch to the [attendance menu \[Page 31\]](#) or the [information menu \[Page 252\]](#) directly from the *business event menu*. Data is automatically updated when you access one of these options. The structure remains expanded.



You access the *business event menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Business Events* → *Business Event Menu*.

Since the *business event menu* gives you optimum access to frequently used reporting functions in *Training and Event Management*, it is a good idea to add it to your *Favorites*.

See also:

[Dynamic Menus \[Page 16\]](#)

The Dynamic Business Event Menu

The Dynamic Attendance Menu

Definition

[Dynamic menu \[Page 16\]](#) where you carry out all the functions that are associated with day-to-day activities for bookings (book, prebook, cancel, etc.), handle the manual output of correspondence, and request reports for correspondence histories and attendance appraisals.

See also:

[Day-To-Day Activities \[Page 179\]](#)

Use

You can carry out the following functions in the *dynamic attendance menu*:

[Book Attendance \[Page 190\]](#)

[Prebook Attendance \[Page 199\]](#)

[Rebook Attendance \[Page 206\]](#)

[Cancel Attendance \[Page 208\]](#)

[Replace Attendance \[Page 211\]](#)

In addition, you can handle manual correspondence and request reports for correspondence histories.

To maintain objects in any of the dynamic menus, you simply position the cursor on the object in question and choose the required function with a right mouse click on the object or from the menu.

See also:

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

You can configure user-specific settings for data display and maintenance in the dynamic menus.

See also:

[User-Specific Settings \[Page 19\]](#)

Integration

You can branch to the [business event menu \[Page 29\]](#) or the [information menu \[Page 252\]](#) directly from the attendance menu. Data is automatically updated when you access one of these options.



You access the *attendance menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Attendance* → *Attendance Menu*.

Since the *attendance menu* gives you optimum access to the day-to-day activities of *Training and Event Management*, it is a good idea to add it to your *Favorites*.

The Dynamic Attendance Menu

See also:

[Dynamic Menus \[Page 16\]](#)

Dynamic Information Menu

Definition

[Dynamic menu \[Page 16\]](#) you use to request reports for attendance, resources, and business events.

Use

The *dynamic information menu* lets you request reports for business events, resources, or attendance directly from any level of the structure.

The following reports are available:

For attendance:

- [Attendee List \[Page 257\]](#)
- [Attendance List \[Page 259\]](#)
- [Employee list \[Page 261\]](#)
- [Bookings per Attendee \[Page 263\]](#)
- [Attendee's Training History \[Page 265\]](#)
- [Attendance Prerequisites \[Page 267\]](#)
- [Attendee's Qualifications \[Page 269\]](#)
- [Prerequisites Matchup \[Page 271\]](#)
- [Attendee Appraisal \[Page 273\]](#)
- [Prebookings per Business Event Type \[Page 276\]](#)
- [Prebookings per Attendee \[Page 278\]](#)
- [Attendees to Be Rebooked \[Page 280\]](#)
- [Attendance Statistics \[Page 319\]](#)
- [Attendance and Sales Statistics \[Page 284\]](#)
- [Cancellations per Business Event \[Page 286\]](#)
- [Cancellations per Attendee \[Page 288\]](#)
- [Budget Comparison \[Page 290\]](#)

For resources:

- [Resource Equipment \[Page 294\]](#)
- [Resource Reservation \[Page 296\]](#)
- [Instructor Information \[Page 298\]](#)
- [Graphical Resource Reservation \[Page 300\]](#)
- [Available/Reserved Resources \[Page 302\]](#)

Dynamic Information Menu

- [Resource Reservation Statistics \[Page 304\]](#)
- [Resources Not Yet Assigned per Resource Type \[Page 306\]](#)

For business events:

- [Business Event Demand \[Page 310\]](#)
- [Business Event Schedule \[Page 312\]](#)
- [Business Event Appraisal \[Page 314\]](#)
- [Business Event Hierarchy \[Page 317\]](#)
- [Attendance Statistics \[Page 319\]](#)
- [Business Event Brochure \[Page 321\]](#)
- [Business Event Information \[Page 325\]](#)
- [Business Event Dates \[Page 327\]](#)
- [Resource List per Business Event \[Page 329\]](#)
- [Resources Not Yet Assigned per Business Event \[Page 331\]](#)
- [Material Requirements per Business Event \[Page 341\]](#)
- [Business Event Prices \[Page 336\]](#)

A major advantage of the *dynamic information menu* is that the data extracted by the reports is transferred directly from the structure, which saves you the trouble of entering it manually on a report selection screen.



For example, you want to check resource reservations for a certain business event date. You simply position the cursor on the event date and choose the report *Resource List per Business Event*.

You can also enter report data manually by starting a report without making any selection beforehand.

You can specify whether you want to start reports from the selection screen or not using the *user-specific settings*. You can make a variety of other settings regarding data display and maintenance in the dynamic menus under *user-specific settings*.

See also:

[User-Specific Settings \[Page 19\]](#)

Integration

You can branch to the [business event menu \[Page 29\]](#) or the [attendance menu \[Page 31\]](#) directly from the *information menu*. Data is automatically updated when you access one of these options. You access the same level of the structure as the one you leave.



You access the *information menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Info Systems* → *Information Menu*.

Dynamic Information Menu

Since the *information menu* gives you optimum access to frequently used reporting functions in *Training and Event Management*, it is a good idea to add it to your *Favorites*.

See also:

[Dynamic Menus \[Page 16\]](#)

The Dynamic Planning Menu

The Dynamic Planning Menu

Definition

[Dynamic menu \[Page 16\]](#) you use when you want to determine the [demand \[Page 123\]](#) for a business event date, and when you want to actually [plan events \[Page 115\]](#).

This is the only place these functions are available in *Training and Event Management*.

Use

You can use the *dynamic planning menu* to plan multiple event dates at the same time using the business event type as a reference or model for each individual event.

The number of events you plan is based on the demand that exists for the event type. This demand is determined either automatically by the system or manually by the user.

As with the other dynamic menus, the *planning menu* displays the complete structure of business event groups, types and dates. You can plan and maintain objects directly in the structure. The advantage of this is that you can directly refer to the existing event catalog when you schedule event dates.

In addition, you can avail of functions that automatically determine the demand that exists for events. Demand can be based on one or any combination of the following reports:

- Prebookings for the business event type
- Bookings made the previous year
- Demand statistics from the previous year.



You access the *planning menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Business Events* → *Dates* → *Planning Menu*.

Since the *planning menu* offers you the most efficient method of plan business events based on demand, it is a good idea to add it to your *Favorites*.

You can configure user-specific settings for data display and maintenance in the dynamic menus.

See also:

[User-Specific Settings \[Page 19\]](#)

[Dynamic Menus \[Page 16\]](#)

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

[Demand Determination \[Page 121\]](#)

[Business Event Date Planning \[Page 115\]](#)

The Dynamic Tool Menu

Definition

[Dynamic menu \[Page 16\]](#) you use to create and maintain infotypes for the core objects of *Training and Event Management* (business event groups, types dates, and attendees).

You can also translate the names of all objects used in *Training and Event Management* in the *tool menu*.

Use

The *dynamic tool menu* lets you create and maintain infotypes for the objects displayed directly from the business event hierarchy structure.



You can create and change all of the infotypes allowed for the objects displayed with the exception of the *Object* infotype (1000). You can only change (not create) the *Object* infotype in the *tool menu*. To create objects, choose [Master Data Catalog \[Page 91\]](#).

The advantage of the *tool menu* is that it lets you edit infotypes for multiple object types at the same time simply by selecting them with the cursor. There is a checkbox displayed for this purpose beside each object in the structure.

If you want to change an infotype for multiple objects, you must select the objects concerned. You can then change the infotype successively for each of the selected objects. This function provides you with a speedy way of, for example, storing price increases for multiple business event types or events.

If you want to translate the language-dependent objects of *Training and Event Management*, choose *Extras* → *Translate Texts*. You access the selection screen of the translation report (RHTRANS0) *Translate Language-Dependent Records*.

If you select multiple objects, the object data of all of the objects is selected for translation. If you want to translate objects that are not displayed, select no (or deselect all) objects in the menu structure, and select the individual objects on the selection screen.

For more information on this report, refer to the relevant report documentation (on the report selection screen under *Help* → *Application Help*).



You access the *dynamic tool menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Tools* → *Tool Menu*.

You can configure user-specific settings for data display and maintenance in the dynamic menus.

See also:

[User-Specific Settings \[Page 19\]](#)

[Dynamic Menus \[Page 16\]](#)

The Dynamic Tool Menu

Dynamic Resource Menu

Definition

[Dynamic menu \[Page 16\]](#) you use to create and manage resources and resource types in a structured hierarchy in *Training and Event Management*.

Use

The *dynamic resource menu* lets you manage all of your resources and resource types in a clearly structured environment, thus facilitating your resource reservation activities.

The following functions are available in the menu:

- Create, display, and change resources
- Create, display, and change resource types
- Display and change business events (for resource reservation)
- Request reports for resources and business events to ensure correct reservation and allocation of resources for scheduled events (e.g. [Resources Not Yet Assigned \[Page 306\]](#)).
- Request reports that support resource reservation (e.g. [Resource list \[Page 329\]](#))
- Lock/unlock resources of the type *room*.

Structure

The *dynamic resource menu* has the same hierarchical structure as the other dynamic menus: the resource types at the top level of the hierarchy and the resources at the lower level.

If resources have been reserved for one or more scheduled events, the event dates are displayed a level below the reserved resources.



You access the *resource menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Resources* → *Resource Menu*.

If you plan to use the *resource menu* to manage your business event resources, it is a good idea to add it to your *Favorites*.

You can configure user-specific settings for data display and maintenance in the dynamic menus.

See also:

[User-Specific Settings \[Page 19\]](#)

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

Master Data Catalog

Definition

[Dynamic menu \[Page 16\]](#) you use to create and maintain the master data objects of *Training and Event Management* in a clearly structured hierarchy.

Use

The main function of the *master data catalog* is to enable you to create and maintain objects and their relationships.

The *master data catalog* provides you with a speedy way to create new master data objects. By simple cursor selection you can quickly indicate at what position you want to create a new object.

When you create a new object in this way, the relevant relationship with an existing object is automatically created as well.

There are two *Create* options:

- You can choose *Create (Same level / level down / by copying)* to create a new object and the relevant relationship in one go.



Select a business event group and choose *Object Create Level Down*. This automatically creates the relationship *incorporates* between the business event group and event type. From here, you access the data screen *Create Business Event Type*.

Once you have entered data for the new event type and saved your entries, you return to the master data menu.

You also have the option of creating new objects by copying from existing reference objects. You do so with the function *Create by copying*. The data of the existing object is proposed onscreen for the new object. You may overwrite data as required.

- You can choose *Create Relationship* to create a new relationship between two existing objects. In addition, you can use this function to move an object. You do so by relating the object with a different target object. The original relationship is delimited when you do this.



The function *Create Relationship* is particularly useful when you need to correct or change data already maintained.

For example, if the system does not propose the right resource types for reservation, this is often because the relevant relationships have not been maintained for the resource type in the [Availability Indicators \[Page 352\]](#) infotype or because the relationship *requires resource type* has not been maintained for the event type.


See also:

[Resource Reservation in Training and Event Management \[Page 105\]](#)

Structure

Like the other dynamic menus of *Training and Event Management*, the *master data catalog* is hierarchically structured. The top level is occupied by business event groups, below which lie the event types assigned to these. All of the objects assigned to event types, such as event dates or resource types, occupy the underlying levels of the hierarchy.



If you want to display an overview of the object types and their IDs, you can choose  (*User-Specific Settings*) and on the *View* tab select the option *With key*. If you want to display the relationships, select *With additional information* as well.

Integration

You access the *Master Data Catalog* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Settings* → *Current Settings*.

You can also access the *master data catalog* in *Customizing for Training and Event Management* under *Business Event Preparation* → *Maintain Master Data via Catalog*.

See also:

[User-Specific Settings \[Page 19\]](#)

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

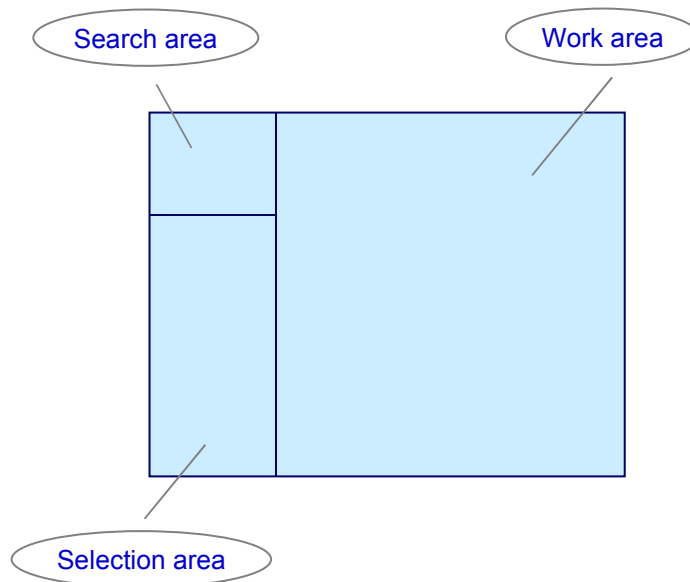
Working with the Object Manager

Purpose

The [Object Manager \[Page 44\]](#) provides users with intuitive and uniform navigation options when searching for and selecting objects across multiple components and transactions.

In *Training and Event Management* the object manager is used in the transactions *Book Attendance* and *Prebook Attendance* to search for business event types for booking and prebooking purposes.

The user interface of these transactions is composed of a number of screen frames, each incorporating specific functions:



The *search area* and the *selection area* together make up the [Object Manager \[Page 44\]](#). The *work area* contains the various functions that you can execute for the objects you select. In *Training and Event Management*, you can execute the functions *Book Attendance* and *Prebook Attendance* there.



In the *selection area*, the system always calls the objects most recently edited, with a different key date, where relevant.

Process Flow

The following is a typical process flow:

1. In the *search area*, you [search for \[Page 46\]](#) one or more objects that you want to edit or display, such as all business event types or a specific event type.

Working with the Object Manager

2. The objects found are displayed in the *selection area*. You select one of the objects by double-clicking. It is then displayed in the *work area*.
3. In the *work area* you can execute functions specific to the transaction for the selected object such as *prebook attendance*.

Object Manager

Object Manager

Use

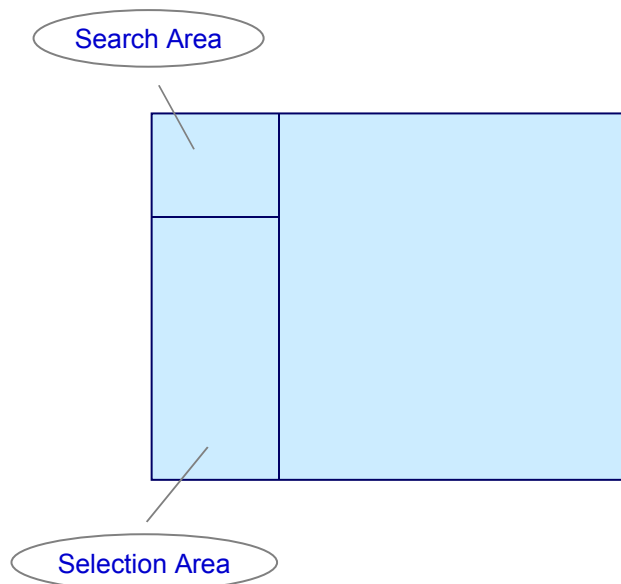
With the *object manager* you can search for and select objects that you want to display or edit.


Prerequisites

You are familiar with the validity concept of the application. The validity concept determines which objects you can find during a search.

Features

The *object manager* consists of the **search area** and the **selection area**.







- In the search area are one or more search functions for each object type, for example the *Search Term* and *Structure Search* functions. These search functions are marked with . In addition, the object type itself can contain a search function. The object types are marked with the respective object type-specific symbol.



If necessary, you can add more object types and search functions in customizing. You can also change the sequence of the search functions. For further information see the Implementation Guide (IMG) under *Personnel Management* → *Global Settings in Personnel Management* → *Settings for Object Manager* or the IMG for *Organizational Management*.

Object Manager

- In the search area you can create **search variants**, so that you can reuse search criteria you have grouped together, or hits. These search variants are marked with .
- In the **selection area** the system displays the objects that you searched for and actually found. According to the search function, this can be either a hit list or a structure.
- You can scroll through search results in the selection area using  and .
- You can completely hide or display the *object manager*, so that the other screen areas get correspondingly bigger or smaller. To do that, choose *Settings* → *Show Object Manager* or *Hide Object Manager*.
- With  you can increase or reduce the size of the selection area, in order to show more hits. As you do that, the search area is hidden or displayed accordingly.



The system saves the last settings relating to screen size and the last object selection user-specifically, and they are available next time you call up the transaction.

You can reset these settings and the last object selection using the report RH_DELETE_OM_USER_SETTINGS. Note that the reset takes place across all applications. For more information, see the report documentation.

- You can call up **generic object services** for a selected object using the right mouse button menu. To do that, select an object in the selection area with the right mouse button and choose *Generic Object Services*. For further information about generic object services, see [List of Object Services \[Ext.\]](#).

Finding/Selecting Objects

Finding/Selecting Objects

Use

In the **Search area** you can search for one or more objects that you want to display or edit.

For each object type there are various **search functions**, for example:

- Search Term
- Structural Search
- Free Search

Prerequisites

Objects you are searching for must already exist. Create new objects as required.

The required object types and search functions are set up.

Procedure


1. In the **search area** select one of the available search functions and if necessary enter the required selection criteria.

In the **selection area** the system displays all found objects with the corresponding object type, either as a list or as a structure.
2. Double-click on the required object.

Using Search Tools


Use

With the search tools for each object type you can search for objects in various object type-specific ways.

These search tools are marked with . In addition, the object type itself can contain a search tool. The object types are marked with the respective object type-specific symbol.



Prerequisites

You are familiar with how the search tools are assigned.

- In the search area, the object type itself can contain a search tool. The object types are marked with the respective object type-specific symbol.
- Search tools can be positioned under the corresponding object type. In that case it is marked with .

Procedure

Searching for Objects Using a Search Term

1. Choose *Search Term* (or the required object type, if it has this search function).
The *Search for <object type>* dialog box appears.
2. Enter a name. This can be a name, abbreviation or numeric ID. You can also search using the entry * .
3. Restrict the number of hits, if required. Enter whether the object you are looking for is **directly** or **indirectly** assigned to another object.
4. Choose  *Search*.
The results of the search are displayed in the **selection area**. The display in the overview and detail areas does not change.
5. If necessary, you can start another search for the same object type and then choose  *Insert* to add the new hits to the first results in the selection area.
6. Double-click on the required object in the selection area.

Searching for Objects Using Free Search

The *Free Search* search tool uses the *InfoSet Query*.

1. Choose *Free Search* (or the required object type, if it has this search function).
The *Find Objects of Type <Object type>* dialog box appears. For further information, see [HR in the InfoSet Query \[Ext.\]](#). After the search, the system displays the search results in the **selection area**.
2. Double-click on the required object in the selection area.


Using Search Tools

Searching for Objects Using Structure Search

1. Choose *Structure Search* (or the required object type, if it has this search function).


In the **selection area** the system displays all found objects of the relevant object type in a tree structure, ordered according to their assignment in the organizational plan.



If necessary, you can refresh the hits displayed in the selection area using . This is recommended, for example, if you have created new objects shortly before.

2. Expand the structure until the required object is revealed.



To display unrelated objects, choose .

3. Double-click on the required object in the selection area.

Using Search Variants

Use

In some search functions, for example *Search Term*, you can restrict the number of hits by using a combination of selection criteria. You can then save such a combination as a **search variant** so that you can use it again. You can also delete a search variant again, if necessary.


Procedure


Creating Search Variants

1. Use one of the search functions to search for objects.

The system displays the hits in the **selection area**.

2. Choose  and enter a name. Choose .

The system saves the search criteria as a search variant and assigns them to the corresponding object type in the **search area**. The search variant is marked with .

3. Select the search variant you created and choose . You can check your search criteria.

Searching for Objects Using a Search Variant


1. Select a search variant.

The hits are displayed in the **selection area**.

2. Double-click on the required object.

Deleting Search Variants

1. Select the search variant that you want to delete.

2. Choose .

The search variant is deleted.

Configuring Columns

Configuring Columns

Use

You can decide which columns should be displayed in different screen areas.

Prerequisites

The columns that are available are determined in Customizing. For further information see the Implementation Guide (IMG) under *Personnel Management → Global Settings in Personnel Management → Column Framework* or the IMG for *Organizational Management*.

Procedure

1. Choose .

The *Column configuration* dialog box appears.

2. Select the columns that you want to display.

Some entries represent column groups, that is, more than one column will be displayed if you select one of these entries.

3. Confirm your entries by choosing .

Result

The columns you selected are displayed.



You can reset all of a user's column configurations using the report RH_DELETE_COL_USER_SETTINGS. Note that the reset takes place across all applications. For more information, see the report documentation.

Business Event Preparation

Purpose

Preparing business events involves creating and maintaining all of the data on which your business event catalog is based, in other words, the master data. When you want to add new objects to your structure or update the data in the structure, you do so in master data maintenance.



You access master data maintenance either in Customizing for *Training and Event Management* under *Business Event Preparation* or in the main menu by choosing [Current settings \[Page 52\]](#).

Process Flow

Before you can use the *Training and Event Management* system productively, you must create all of the necessary master data and set up a business event hierarchy consisting of event groups and event types in Customizing for *Training and Event Management* under *Business Event Preparation*.

In productive use, you can extend your master data as required in *Current Settings*.



As far as possible, you should create new event groups and event types in the [master data catalog \[Page 91\]](#). The catalog provides you with a clearly structured environment in which to create all other data and the pertinent relationships between objects.

Features

- The functions under *Current Settings* offer you a quick and simplified way to create and change master data relevant to your business event catalog.
- You can create new master data in *Current Settings* without having to switch to Customizing.
- You can create and change master data directly in the hierarchical structure of your business event catalog in *Current Settings* under *Master data catalog*. Maintaining data directly in the structure provides you with a handy reference to the overall event offering and gives you a better idea of the current status.

Result

See also:

[Current Settings \[Page 52\]](#)

Online documentation for the individual steps in *Current Settings*.

Current Settings

Current Settings

Definition

The functions under *Current Settings* offer you the option of maintaining Customizing settings directly from the application.

Use

You can maintain the same settings from the application as you can in the Customizing step *Business Event Preparation*.

You can create the master data objects of the business event environment such as location, time schedule, or external instructor.

You make the basic settings in Customizing.

The functions under *Current Settings* let you create new master data, such as a new business event type, at a later stage without having to switch to Customizing.

Structure

Current Settings consist of a number of individual settings that you can maintain as required.



The function [master data catalog \[Page 91\]](#) is particularly useful. It offers the same functions as the other dynamic menus for creating and maintaining objects from the business event hierarchy.

You access *Current Settings* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Settings* → *Current Settings*.

See also:

Online documentation for the individual steps in *Current Settings*.

Defining Cost Items

Use

Training and Event Management uses [cost items \[Ext.\]](#) to determine and represent the costs of a business event. You require cost items if you want to use the functions cost transfer posting, internal activity allocation for instructors, and price proposal determination.

You use cost items to store costs for resources, resource types, business events, and business event types.

The costs you store for a business event type, for example, can be taken over for the business event. You can overwrite these default values as required. The same applies to the values you store for a resource type.

The system first reads the costs stored for the business event or the resource itself. If there are no costs stored here, the system then reads the costs stored for the event type or resource type. These costs are added together during price proposal determination.

See also:

[Price Proposal \[Page 156\]](#)

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Cost Items*. The *Change Cost Items: Overview* screen appears.

Check to see whether the table contains cost items that meet your requirements. If not, create new cost items.

1. Choose *New Entries*. The data screen *New Entries: Details of Added Entries* appears.
2. Enter an *abbreviation* and a *long text* for the new cost item.
3. Enter a *start date* and an *end date* to specify the validity period of the cost item.
4. Enter a *proposed amount* and the relevant *currency*. The amount you enter is proposed later as default when you assign the cost item to an object (e.g. when you maintain the *Costs* infotype for a business event type).
5. Specify a *reference unit* (*attendee* and/or *time unit*, or *business event*).
6. Specify whether the cost item is *relevant for transfer*. If you want to transfer costs to *Cost Accounting*, specify a *controlling area* and a *cost element* for the cost item.
7. Save your entries.

Result

You have defined a new cost item.



Defining Cost Items

If you want to change data for an existing cost item, on the initial screen *New Entries: Details of Added Entries*, select the cost item you want to change and choose *Detail*. The data screen appears where you can proceed to change the relevant data.

See also:

[Cost Transfer Posting in Cost Accounting \[Page 151\]](#)

Defining a Time Schedule

Use

In this step, you define a time schedule for business events.

A time schedule defines the timetable of a business event that comprises a number of days, each day consisting of up to three day segments.

You can use the time schedule to create a schedule model for business event types or an actual schedule for a business event.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Time Schedule*. The data screen *Change Time Schedule: Overview* appears.

1. Choose *Day segment*.
2. Check whether the list of day segments contains one that you could assign to your schedule.

If there is no day segment to suit you, choose *New Entries* and enter a key for the new day segment. Assign a maximum of three time blocks (that do not overlap) to the new day segment. You do so by entering a start and end time for each one. Save your entries.
3. Choose *Time schedule*.
4. Choose *New Entries* and enter an ID and a name for the new schedule.
5. Save your entries.
6. Choose *Day schedules*. The data screen *Change Assignment of Day Segments to Day Schedules: Overview* appears. On this screen you specify the number of days covered by your schedule. You assign a *day segment* to each of the day schedules.
7. Choose *New Entries* and select your new schedule under *Schedule*.
8. Assign a day number to each day schedule and assign a day segment to each of the day schedules.
9. Save your entries.

Result

You have created a time schedule for business events.



You use the same procedure to change an existing schedule.

If you want to change the individual day schedules of the time schedule, select these on the initial screen and choose *Day schedules*.

Setting Up a Building Address

Setting Up a Building Address

Use

In this step, you maintain addresses for buildings.

Building addresses provide information on the physical location of rooms.

When you create a resource of the type *Room*, you can maintain the *Address* infotype for it and reference a building address.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Building Address*. The view *Change: Building Address: Overview* appears.

1. Choose *New Entries*. The data screen *New Entries: Details of Added Entries* appears. Enter the following data:
2. The *long and short name* of the building.
3. An *address supplement* (e.g. box number or c/o)
4. A house number and street
5. The *postal code* and the *town or city*.
6. A *country key* (e.g. DE for Germany)
7. A *regional code* (e.g. 08 for Baden-Württemberg).



Enter the country key first and then use the possible entries help to select a regional code.

8. Enter the *telephone number* of the building.
9. Enter the *fax number*.
10. Save your entries.

Result

You have created a new building address in the system.



You can specify what object types reference a building address. You do so in Customizing under *Basic Settings* → *Enhancement Object type modeling* → *Infotype* → *Define Infotypes for Object Types*. Here, you enter the different screen number for the required object type in the *Address* infotype (1028).

Creating a Location

Use

In this step, you create business event locations.

When you create a business event, you can relate it with the location where the event is to be held. You can also assign location-dependent resources such as rooms to locations. You make this assignment in the steps [Creating Rooms \[Page 85\]](#) and [Creating Other Resources \[Page 89\]](#).

You store the following data for locations:


- Address
- Site-dependent additional information (currency, language, and calendar with details of location-specific public holidays).

Prerequisites

It is not mandatory to create locations. If you only plan to use one location for all your business events, you can deactivate the *location* switch in Customizing under *Business Event Preparation* → *Location* → *Use of Business Event Locations*.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Location*. The *Location: Initial Screen* appears.

1. On the initial screen, enter the *validity period* of the new location.
2. Choose . The data screen *Create Location* appears.
3. Enter an *abbreviation* and a *long name* for the new location.
4. Enter site-dependent additional information data as required:
 - The *calendar ID* valid for the location.
 - The *currency* in which event costs are to be settled.
 - The *language* in which events are usually held at the location.
 - Enter address data as required:
 - *An address supplement* (e.g. box number or c/o)
 - A house number and street
 - *A postal code and city or town*
 - *A country key* (e.g. DE for Germany)
 - *A regional code* (e.g. 08 for Baden-Württemberg).


Creating a Location



Enter the country key first and then use the possible entries help to select a regional code.

Specification of the *distance in kilometers* is not relevant at this point, so no entry is required here.

- Enter the *telephone number* of the location, where relevant.
- Enter the *fax number* of the location, where relevant.

5. Choose .

Result

You have created a new location.



Once you have created your first location you can use this as a template for any further locations you want to create. To do so, you enter the ID or name of the object you want to use as a template in the field *Business event location* in the *Copy from* box. The data of the existing object is proposed on the data screen. You can overwrite data as required for your new object.



The Customizing settings made under [Maintain Actions \[Ext.\]](#) affect the data maintenance activities you can carry out for business event locations. In this step, you specify what infotypes may be maintained for locations. You can also specify under *Maintain Actions* whether locations may be structured in a hierarchy. The standard system does not provide the relationship *belongs to* which would enable you to set up such a hierarchical structure.

Creating an Organizer

Use

This function lets you create two types of organizer:

- external organizers, such as, object types *company*, *customer*
- internal organizers, such as, object type *organizational unit*

Organizers are assigned to organizer types. You can store billing and activity allocation data for internal organizers (organizational units) such as cost center assignment or the *Billing/Allocation Info* infotype.



See also:

[Business Event Types \[Page 73\]](#)

Prerequisites

You must first define what object types you want to use as organizer types in Customizing for *Training and Event Management* under [Specify Organizer Types \[Ext.\]](#).

Procedure

1. On the SAP Easy Access screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Settings* → *Current Settings* → *Organizer* → *Create*. A dialog box appears displaying the organizer types you use.
2. Select an organizer type for the new organizer.
3. Choose . You access directly the initial screen or data screen of the organizer type you selected.
4. Enter organizer data as required.
5. Choose .

Result

You have created an organizer and can assign him or her to business event types.

See also:

[Creating a Company \[Page 65\]](#)

[Creating an Organizational Unit \[Page 67\]](#)

Creating a Company

Creating a Company


Use


In this step, you can create companies that could have the following functions in *Training and Event Management*:

- external organizer of seminars, conventions, sales events and so on
- potential organizer of a business event type
- actual organizer assigned to a business event
- external instructor, external attendee, or [event owner \[Ext.\]](#)

You store address data for companies, such as telephone number, fax, and so on.

Procedure


On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Organizer* → *Create*. A dialog box appears in which you can select the organizer type *Company*. Choose . The *Company: Initial Screen* appears.

5. On the initial screen, enter the *validity period* of the new company.
6. Choose . The data screen *Create Company* appears.
7. Enter an *abbreviation* and a *long name* for the company.
8. Enter address data as required:

- An *address supplement* (e.g. box number or c/o)
- A house number and street
- A *postal code and city or town*
- A *country key* (e.g. DE for Germany)
- A *regional code* (e.g. 08 for Baden-Württemberg).



Enter the country key first and then use the possible entries help to select a regional code.

- Specification of the *distance in kilometers* is not relevant at this point, so no entry is required here
 - *Telephone number* of the company.
 - Fax number
5. Choose .

Result

You have created a company in the system.

Creating a Company



Once you have created your first object, or if an object already exists in the system, you can use this as a template for any further objects you want to create. To do so, you enter the ID of the object you want to use as a template in the Company field in the *Copy from* box. The data of the existing object is proposed on the data screen. You can overwrite data as required for your new object.



The Customizing settings made under [Maintain Actions \[Ext.\]](#) affect the data maintenance activities you can carry out for companies. In this step, you specify what infotypes may be maintained for what object types.

Creating Organizational Units

Creating Organizational Units

Use

In *Training and Event Management*, organizational units can be internal organizers of events for the company's training and education needs, and they can also be attendees of events or [event owners \[Ext.\]](#).


Organizational units are created in the *Organizational Plan* component (PA-OS). Their integration in the organizational structure is of significance there.

Before you create a new unit, check to see that it does not already exist. When you create a new organizational unit, you assign it to the required place in the existing organizational structure.

Prerequisites

If you want to use organizational units as organizer types and attendee types, you must have the *Organizational Plan* component (PA-OS) installed. You must also ensure that you are using the active plan version for integrated use.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Organizer* → *Create*. A dialog box appears in which you can select the organizer type *Organizational unit*. Choose . The *Create Organization and Staffing* screen appears.

1. Identify the organizational unit you want to use as the root object for your new organizational unit. The organizational unit is displayed in the *Overview Area*.
2. Choose *Create organizational unit*. On the *Overview Screen*, a new organizational unit is created below the parent object you selected.
3. Under *Basic Data*, in the *Abbr.* and *Name* fields, enter data as required for your new organizational unit.
4. Enter all further data as required. (For example, you can specify that the new organizational unit has a staff function.)



Ensure that the validity date is correct. The validity date you specify applies to all of the data created for the new object.

5. Choose .

Result

You have created a new organizational unit and integrated it in the existing organizational structure.



The settings made under *Basic Settings* → *Dialog Control* → *Current Settings* → *Maintain Actions* affect the data maintenance activities you can carry out for

Creating Organizational Units

organizational units. In this step, you specify what infotypes may be maintained for what object types.

For detailed information on this procedure and on organizational structures:

See also:

[Editing the Organizational Structure \[Ext.\]](#)

[Creating an Organizational Unit \[Ext.\]](#)

Creating an Attendee

Creating an Attendee

Use

In this step, you create attendee data in the system. In *Training and Event Management*, attendees are assigned to attendee types. This assignment also determines the kind of data that is maintained for the attendee.



You only maintain address data for attendees of the type *external person*.



For an attendee of the type *person* (internal employee), you must maintain all of the data recorded in *Personnel Administration* (PAPA) when a person is hired, such as cost center assignment.

The attendee's data must be stored in the system before you can book the attendee for a business event.

Prerequisites

You must first define what object types you want to use as attendee types in Customizing for *Training and Event Management* under [Specify Attendee Type Control \[Ext.\]](#).

Procedure

1. On the SAP Easy Access screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Settings* → *Current Settings* → *Attendee* → *Create*. A dialog box appears displaying the attendee types you use. Select the attendee type to which you want to assign the new attendee.
2. Choose . You access directly the initial screen or data screen of the attendee type you selected.
3. Enter attendee data as required.
4. Choose .

Result

You have created an attendee that you can book for business events.

See also:

[Attendee Types \[Page 180\]](#)

[Displaying/Changing Attendee Data \[Page 184\]](#)

Creating a Company


Use

In this step, you can create companies that could have the following functions in *Training and Event Management*:


- external organizer of seminars, conventions, sales events and so on
- potential organizer of a business event type
- actual organizer assigned to a business event
- external instructor, external attendee, or [event owner \[Ext.\]](#)

You store address data for companies, such as telephone number, fax, and so on.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Organizer* → *Create*. A dialog box appears in which you can select the organizer type *Company*. Choose . The *Company: Initial Screen* appears.

9. On the initial screen, enter the *validity period* of the new company.

10. Choose . The data screen *Create Company* appears.

11. Enter an *abbreviation* and a *long name* for the company.

12. Enter address data as required:

- *An address supplement* (e.g. box number or c/o)
- A house number and street
- *A postal code and city or town*
- *A country key* (e.g. DE for Germany)
- *A regional code* (e.g. 08 for Baden-Württemberg).



Enter the country key first and then use the possible entries help to select a regional code.

- Specification of the *distance in kilometers* is not relevant at this point, so no entry is required here
- *Telephone number* of the company.
- Fax number

6. Choose .

Result

You have created a company in the system.

Creating a Company



Once you have created your first object, or if an object already exists in the system, you can use this as a template for any further objects you want to create. To do so, you enter the ID of the object you want to use as a template in the Company field in the *Copy from* box. The data of the existing object is proposed on the data screen. You can overwrite data as required for your new object.



The Customizing settings made under [Maintain Actions \[Ext.\]](#) affect the data maintenance activities you can carry out for companies. In this step, you specify what infotypes may be maintained for what object types.

Creating Organizational Units

Use

In *Training and Event Management*, organizational units can be internal organizers of events for the company's training and education needs, and they can also be attendees of events or [event owners \[Ext.\]](#).


Organizational units are created in the *Organizational Plan* component (PA-OS). Their integration in the organizational structure is of significance there.

Before you create a new unit, check to see that it does not already exist. When you create a new organizational unit, you assign it to the required place in the existing organizational structure.

Prerequisites

If you want to use organizational units as organizer types and attendee types, you must have the *Organizational Plan* component (PA-OS) installed. You must also ensure that you are using the active plan version for integrated use.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Organizer* → *Create*. A dialog box appears in which you can select the organizer type *Organizational unit*. Choose . The *Create Organization and Staffing* screen appears.

6. Identify the organizational unit you want to use as the root object for your new organizational unit. The organizational unit is displayed in the *Overview Area*.
7. Choose *Create organizational unit*. On the *Overview Screen*, a new organizational unit is created below the parent object you selected.
8. Under *Basic Data*, in the *Abbr.* and *Name* fields, enter data as required for your new organizational unit.
9. Enter all further data as required. (For example, you can specify that the new organizational unit has a staff function.)



Ensure that the validity date is correct. The validity date you specify applies to all of the data created for the new object.

10. Choose .

Result

You have created a new organizational unit and integrated it in the existing organizational structure.



The settings made under *Basic Settings* → *Dialog Control* → *Current Settings* → *Maintain Actions* affect the data maintenance activities you can carry out for

Creating Organizational Units

organizational units. In this step, you specify what infotypes may be maintained for what object types.

For detailed information on this procedure and on organizational structures:

See also:

[Editing the Organizational Structure \[Ext.\]](#)

[Creating an Organizational Unit \[Ext.\]](#)

Business Event Group

Definition

Business event groups serve to classify business event types that share the same characteristics or deal with related subject matter such as *Language Courses* or *Data Processing Courses*.

A business event group can contain subordinate event groups, such as *English Courses* or *Microsoft Word Courses*, which typically contain multiple business event types. Thus, you can create a hierarchical structure of event groups.

Example:



Use

The hierarchical structure, starting with event groups and working down, makes your business event catalog accessible and easy to navigate from the user's point of view, and easier to create from your point of view. The business event groups occupy the highest level of this hierarchy.

You could decide to start with the event group *Data Processing Courses*, for instance. From here, you would work your way down to the individual events and dates.

Business event groups can also be selected as subject areas in the search for business events in the Employee Self-Service *Training Center*.

Using business event groups to structure your event catalog improves system performance in the dynamic menus. To further improve performance, you can define a virtual business event group as the top node of your event hierarchy. You do so in Customizing for *Training and Event Management* under *Basic Settings* → *Dialog Control* → *Technical Settings* → *Dynamic Menus* in the entry SEMIN LROOT.

Structure

You create business event groups in Customizing for *Training and Event Management* under *Business Event Preparation* → [Create business event group \[Ext.\]](#) or in the *Master Data Catalog*. You can store the following information for business event groups:

- *Validity period* of the business event group

Business Event Group



For clarity's sake, we recommend you to define 01/01 of the respective year as the validity start date.

- *Long and short name*
- *Description of contents*

The description you store here is used also for the business event brochure if this business event group is included in the brochure.

- Relationships to other event groups (*belongs to*) and to business event types (*incorporates*).
- Indicator that the event group can be selected as a subject area in the search for business events in the Employee Self-Service *Training Center* See also [Info Business Event Group \(Infotype 1063\) \[Page 376\]](#).

The first two attributes are mandatory; all others are optional.

Integration

Business event groups together with event types, event dates, and the *relationships* that exist between them form a hierarchical structure. You generally maintain these relationships when you create a new object.

In the hierarchy, business event groups occupy the top level. You can make the hierarchy as deep as you want by combining multiple event groups into one higher level group.



It is not mandatory to use business event groups at all. If you decide not to use them, your business event types are classified as *Unassigned business event types* and the resulting hierarchy is flatter.

In addition, any business event types you create but do not assign to an event group are listed as *Unassigned business event types*.

Creating relationships between event groups and event types considerably improves system performance.

See also:

[Creating a Business Event Group \[Page 71\]](#)

[Business Event Catalog \[Page 94\]](#)

[Business Event Types \[Page 73\]](#)

[Business Event Dates \[Page 96\]](#)

Creating a Business Event Group

Use

In this step, you create business event groups.

You can assign business event types to business event groups. You do so in the step [Creating a Business Event Type \[Page 79\]](#).

You store the following information for business event groups:

- *General description:*
The general description of the event group is included in the event brochure.
- *Relationship - belongs to business event group:*
Here you assign a business event group to a higher level one. You create the business event hierarchy from the top down.
- *Business Event Group Info:*
You can specify that the event group should be offered as a subject area for the search for business events and for selection in the Employee Self-Service *Training Center*.
See also: [Business Event Group Info \(Infotype 1063\) \[Page 376\]](#)



Once you have created an object, you can create all further objects and data in a hierarchy in the [Master Data Catalog \[Page 91\]](#). When you create objects there, the pertinent relationships with other objects in the hierarchy are automatically created too.



Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Business Event Group*. The *Business Event Group: Initial Screen* appears.

1. Enter the validity start date of the object in the *Validity* field.



For clarity's sake, you should specify 01/01/ of a calendar year.

2. Choose .
3. Enter data as required for the event group:
 - a. *Short and long name* (required entry)
 - b. *Description*
 - c. *Relationships*
 - d. *Business Event Group Info:*
4. Choose .

Creating a Business Event Group**Result**

You have created a new business event group.



Once you have created your first object, or if an object already exists in the system, you can use this as a template for any further objects you want to create. To do so, you enter the ID or the name of the object you want to use as a template in the field *Business event group* in the *Copy from* box. The data of the existing object is proposed on the data screen. You can overwrite data as required for your new object. You can find this function in the *master data catalog* by choosing *Object* → *Create by copying*.



The Customizing settings made under [Maintain Actions \[Ext.\]](#) affect the data maintenance activities you can carry out for business event groups. In this step, you specify what infotypes may be maintained for what object types.

Business Event Type

Definition

A business event type is a generalized description of an event including information such as contents, price, capacity, and language. It is not scheduled to take place on a fixed date. It serves as the blueprint or model from which actual event dates can be scheduled.

A business event or event date is the actual event based on the business event type with its associated information. It is scheduled to take place on a specific date or in a specific period.

You store the attributes that are typical for all events of a given type with the event type.

Business event types can be classified into business event groups, thus forming a hierarchical structure.

Example:



Use

Business event types:

- Form part of a clearly structured hierarchy consisting of business event groups and event dates. Make your event offer more accessible and easier to navigate.
- Lighten your workload by enabling one-time data entry. The data you store for the business event type can be passed on to each of the related event dates. You have the option of modifying this data in specific instances if required.



Once you have created one business event type, you can use it as a reference to copy others from. The data of the original event type is proposed as default for the new event type, but you can overwrite it as required.

Structure

When you create a business event type, you store all of the data required for holding the event that is not time-specific, such as:

- *Description*

Business Event Type

The *Description* infotype lets you store descriptive texts for a business event type that can be used in the event brochure or in the Employee Self-Services on the business event detail screen. The infotype consists of the subtypes *Extended Business Event Type Text*, *Business Event Contents* and *Notes*.

- *Main schedule pattern (schedule model)*

This subtype of the [Schedule Model \[Page 370\]](#) infotype lets you define a time schedule that can be automatically taken over (copied) when event dates are created or planned.

- *Capacity*

You can store a *minimum*, *optimum*, and a *maximum capacity* [\[Page 355\]](#) for the event type. The capacity value you store for the business event type is used as the default value for the number of attendees for the actual event. The overall capacity is determined on the basis of the business event capacity and the room capacity. The information in the *Capacity* infotype plays a role in the following functions:


- Bookings: the overall capacity (taking account of room capacity and event capacity) defines the borderlines between normal, essential, and waiting list bookings.
- Resource selection: Using the capacity values stored for the event and for the room, the system proposes only resources (rooms) that have adequate capacity and rates these in relation to the event capacity. The closer the capacity of the resource is to the event capacity, the better suited the resource is for the event, and the higher the suitability value assigned to the resource as a result.
- Price proposal: when determining a price proposal for an event type, the system uses the optimum capacity defined.

The capacity stored for the event type is automatically read if no capacity is stored for the event itself.

- *Prices*

You can store an *internal* and an *external price* [\[Page 351\]](#) for the event type. The internal price is used for internal activity allocation purposes, while the external price is used for billing purposes.



If you want to determine a price for the business event, you can use the function [Determine price proposal \[Page 160\]](#) on this data screen by choosing . You must maintain the cost items for the business event or business event type, and the resource or resource type (in the *Costs* infotype) with the relevant reference unit. For more information, refer to [Price Proposal \[Page 156\]](#)

- *Business Event Type Info*

You can make the following specifications in the [Business Event Type Info \[Page 362\]](#) infotype:

If you want the event type included in the business event brochure, select the *In event brochure* indicator. When you start the report to generate the event brochure, you can select the option *Selected event types only*. You make this selection when you set this indicator for the event type.

Convention: If you are creating a multi-session business event type with multiple sessions running in parallel, select the *Convention* indicator.

Business Event Type

No Intranet :If you do not want events of this event type displayed in the *Employee Self-Services* of *Training and Event Management*, select the *No Intranet* indicator.


In this infotype, you can also make specifications for internal attendees and instructors that apply to the *Time Management* component:

- *No integration*: You use this indicator to deactivate integration with *Time Management* for attendees and instructors of events of this type. This means that no attendance and absence records are written to *Time Management*.
- *Allowed in time off*: You use this indicator to specify that a person can attend or hold an event of a certain type even if time off records have been stored for the person during the same period in *Time Management*.
- *Minimum percentage* (for attendees only): You can use this entry to specify the minimum amount of time an attendee must be present at an event of a given type to qualify as attendance. If the value you specify here is not recorded for an attendee, the attendance booking is considered to be insufficient and is automatically canceled. Here, you enter a percentage of the complete event duration.

This entry overrides the value stored for the event type in the SEMIN TIMEP entry in Customizing for *Training and Event Management* under *Integration* → *Time Management* → *Specify Attendance Types*.

• **Relationships**

In *Training and Event Management*, information and attributes of objects are stored in infotypes and relationships. You can store the following relationships for business event types in the *Relationship* infotype:

- *Belongs to business event group*:
Here you specify the superior business event group.
- *Requires resource type*:
Here you specify the resource types that are needed to carry out an event of this type.

You must maintain this relationship if you want to use resources in *Training and Event Management*.
If you want to use the resource types *Instructor* and *Material*, you must also maintain the relationships *is held by* (for the resource type *Instructor*) and *uses for attendee/business event Material* (for the resource type *Material*).
- *Is held by person/... user/.. external person/... contact person*:
You specify the instructor(s) to be proposed for the event type as a rule.
- *Uses Material (for attendee)*
Here you specify the material that is required per attendee. You specify object types, not concrete materials. For example, you can specify that the event type requires the material type *Course book* per attendee.
- *Uses Material (for business event)*

Business Event Type

Here you specify the material that is required per business event. For example, you can specify that the event type requires the material type *overhead projector* per event.

- *Is organized by organizational unit/... company*

Here you specify the organizer. The information stored here as to whether the organizer is internal (organizational unit) or external (company) is used for billing and activity allocation purposes and for the *Correspondence* function.

- *Presupposes business event type:*

Here you specify the qualification defined as prerequisite for attendance. In the *Procedure* infotype, you can specify whether a check is carried out for this prerequisite during booking. (By doing so you override the general settings made in Customizing for *Training and Event Management* under [Attendee Checks \[Ext.\]](#) for this event type.)

- *Presupposes qualification*

Here you specify the qualification defined as prerequisite for attendance. In the *Procedure* infotype, you can specify whether a check is carried out for this prerequisite during booking. (By doing so you override the general settings made in Customizing for *Training and Event Management* under [Attendee Checks \[Ext.\]](#) for this event type.)

- *Imparts qualification:*

Here you specify the qualification attained by attending an event of this type. This relationship is used for the check the system carries out for attendance prerequisites and when transferring qualifications to attendees during follow-up processing. This information is stored in the *Procedure* infotype, which you can also maintain for the event type (see below).

- *Cost center assignment:*

Here you relate a cost center with the master cost center (for accounting purposes for the cost items of a business event).

- *Has attendee model appraisal / has business event model appraisal*

In this infotype, you can select the forms of appraisal you want to use for business event and attendee appraisals. The entries you make here override the general settings made in Customizing for *Training and Event Management* under [Set Up Control Parameters \[Ext.\]](#).

- *Is planned for job*

You use this relationship to specify the target group (represented by the object type *Job*) of the event type. This information can be printed in the event brochure.

- *Is the responsibility of external person/person/contact person/user:*

This relationship lets you specify an event owner for a business event type.

- *Validity duration (Depreciation Meter/Validity infotype)*

The [Depreciation Meter/Validity \[Page 357\]](#) infotype lets you specify the period of time in days and/or months during which attendance of a business event is valid as a prerequisite for attendance of a follow-up event.

- *Further Information*

On this tabstrip, you can maintain the following information:

- *Business Event Demand*

The [Demand \[Page 372\]](#) infotype lets you specify what demand there is for event dates of an event type per quarter, per location, and per language.

However, we recommend that you determine demand in the dynamic *Planning* menu instead.

- *Billing/Allocation Info*

The [Billing/Activity Allocation Info \[Page 369\]](#) infotype lets you assign business event types to sales areas. You need sales areas when you carry out billing for business events. You also specify the controlling area and the activity type for internal activity allocation (for attendance and instructor function).

- *Costs*

In the [Costs \[Page 368\]](#) infotype you assign costs to business event types. The costs are subdivided into cost items. You should have already created the cost items in Customizing under *Business Event Preparation* → *Define Cost Items*.

- *Procedure*

In the [Procedure \[Page 364\]](#) infotype, you instruct the system how to react during checks for double bookings, double prebookings, attendance prerequisites and qualifications. In addition, you specify what follow-up actions are to be executed during follow-up processing.



When you create the *Procedure* infotype for a business event type, you override the general settings made in Customizing for *Training and Event Management* under [Attendee Checks \[Ext.\]](#) and under [Follow-up Processing \[Ext.\]](#) for this event type.

- *Web Link*

The [Web Link \[Page 374\]](#) infotype lets you link a business event type with any URL addresses on the Internet.

- *Knowledge Link*

The [Knowledge Link \[Page 375\]](#) infotype lets you link a business event type with the info objects in the SAP Knowledge Warehouse (Info Database Version 4).



Most of the above data is optional. It is only mandatory to specify the validity period, and the long and short name of an event type.

However, the more information you store for the event type when you create it, the less work you have with each of the individual event dates based on it.

Business Event Type**Integration**

You can create and edit business event types both in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current settings*.

See also:

[Creating a Business Event Type \[Page 79\]](#)

[Business Event Catalog \[Page 94\]](#)

[Business Event Groups \[Page 69\]](#)

[Business Event Dates \[Page 96\]](#)

Creating a Business Event Type

Use

In this step, you create business event types. A business event type is a general description of a business event or event date. It serves as the blueprint or model from which individual event dates can be created. In contrast to a business event date, a business event type cannot be scheduled to take place at a particular time.


Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Business Event Types*. The *Business Event Type: Initial Screen* appears.

1. Enter the validity start date of the object in the *Validity* field.



For clarity's sake, you should specify 01/01/ of a calendar year.

2. Choose . The *Create Business Event Type: Data Screen* appears.
3. Enter an *abbreviation* and a *long name* for the event type.
4. Enter data as required for the new business event type. Do so by maintaining the relevant infotypes via the tab strips.



Refer to the information contained for the individual infotypes under the section *Structure* in [Business Event Type \[Page 73\]](#).

5. Choose .

Result

You have created a new business event type.



Once you have created your first object, or if an object already exists in the system, you can use this as a template for any further objects you want to create. To do so, you enter the ID of the object you want to use as a template in the field *Business event type* in the *Copy from* box. The data of the existing object is proposed on the data screen. You can overwrite data as required for your new object. You can find this function in the *master data catalog* by choosing *Object* → *Create by copying*.



The Customizing settings made under [Maintain Actions \[Ext.\]](#) affect the data maintenance activities you can carry out for business event types. In this step, you specify what infotypes may be maintained for what object types.

Creating a Business Event Type

Resource Type

Definition

A resource type is a classification of resources that share the same characteristics or attributes. *Training and Event Management* distinguishes four classifications of resource types:

[Room \[Page 85\]](#)

[Instructor \[Page 87\]](#)

[Material \[Page 106\]](#)

[Other resource \[Page 89\]](#)

Use

Categorizing resources into resource types facilitates resource management and provides you with a clear overview of resource availability. When you create a resource type, you define the attributes that all resources of this type have in common.

When you assign resource types to a business event type in the *Create Business Event Type* function, you are specifying utilities that may be required for holding the event. You assign the actual resources to the actual scheduled event with the function *Create Event Dates with Resources*.

See also:

[Creating a Business Event Type \[Page 79\]](#)

[Creating a Business Event Date with Resources \[Page 108\]](#)

Structure

When you create a resource type, you store indicators or attributes that characterize resources of this type. You maintain the following infotypes:

Availability Indicators:

The [Availability Indicators \[Page 352\]](#) infotype lets you specify the conditions that apply to the resource types required when a business event is planned.

- Whether the resource in question is a *room*, *instructor*, *material* or *other resource*.
- *Resource priority*: You can assign a priority value to resources, specifying the order in which resources are presented to you during automatic resource reservation.
- *Location-dependency*: If you use business event locations, you can maintain this indicator for *rooms*. Once you set the *room* indicator for a resource, the system automatically proposes the *location-dependent* indicator.
- *Required resource*: You use this indicator to specify that a certain resource is essential for a business event and must be reserved in the planning process. A resource with this indicator must be reserved for the event; otherwise the event may have to be canceled. The associated indicators *multiple* and *single* let you specify whether a *required* resource can be reserved by multiple business events or only by one.

Resource Type



Only resources that have this indicator are reserved during *automatic resource selection*.

- *Amount available*: This feature lets you specify how many resources of a type you need per event or per attendee. For example, per event you require *one* resource of the type *room*, per two attendees you need *one* PC (other resource).
- *Alternative resource search*: When you search for the resources *material* and *instructor*, you can specify here the relationships or object types to be proposed for selection during resource reservation. The system automatically enters the relevant relationship when you specify one of the above-mentioned categories.



Resource types are represented by the object type R. Depending on their classification, the resources themselves are represented as follows:

- The resource *room* is represented by the object type G.
- The resource *instructor* is represented by the object type P (for an instructor from the HR master data) or by H (for an external instructor). You can, however, define your own object types for your instructors.
- The resource *material* is represented by the object type M.
- The resource *other resource* is represented by the object type G.

During resource selection when you plan or create business event dates, the system handles the various resources differently. No further specifications are required for object type G (*room* and *other resource*).

The system finds resources of object types M, P or H (material and instructors) using the function [Alternative resource search \[Ext.\]](#). This lets you determine specific resources for a business event type, for example, you can determine that instructor X may hold events of type Y. In this case, you must enter either the alternative object type with which the resource type is related or an allowed relationship between the object type and the business event type, such as *is held by (instructor)* or *uses for business event/attendee (material)*.

Capacity

The [capacity \[Page 355\]](#) infotype lets you specify the *minimum*, *optimum*, and *maximum* capacity of rooms. These values are compared with the capacity values stored for a business event or event type when attendance is booked.

Relationships

In this infotype, you specify the cost center to which resources of a resource type belong. The cost center you enter here is proposed as default for the pertinent resources. You may overwrite it if required.

Further Information

You maintain the [Costs \[Page 368\]](#) infotype on this tab page. You assign costs (subdivided into cost items) to a resource type. This information is required for cost transfer to *Cost Accounting* and for the price determination feature as well.



Before you can maintain the *Costs* infotype, you must work through the *step Define Cost Items* in Customizing for *Training and Event Management*.



It is not mandatory that you store the infotypes *capacity*, *cost center*, or *cost data* for the resource type. You can store this data for the individual resources instead. We recommend that you maintain this information for the resource types. The values you store apply then to all resources of a given type.

If required, you can override these values by maintaining a different value for one specific resource.

Integration

You can create resource types and resources in *Current Settings* or in Customizing under *Business Event Preparation*.



Maintaining resources and resource types in the [dynamic resource menu \[Page 39\]](#) offers you a more structured and clearer working environment. An added advantage is that you can directly reserve resources for business events there.

See also:

[Creating a Resource Type \[Page 84\]](#)

[Availability Indicators \(Infotype 1023\) \[Page 352\]](#)

[Capacity \(Infotype 1024\) \[Page 355\]](#)

[Costs \(Infotype 1036\) \[Page 368\]](#)

Creating a Resource Type

Creating a Resource Type

Use

In this step, you create resource types. You store attributes that are typical to all resources of a given type with the resource type.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Resource Management* → *Resource Type*. The *Resource Type: Initial Screen* appears.

1. Enter the validity start date of the object in the *Validity* field.



For clarity's sake, you should enter 01/01/ of a calendar year.

2. Choose *Create*. The *Create Resource Type: Data Screen* appears.
3. Enter an *abbreviation* and a *long text* for the resource type.
4. Select the category of the resource type *Room*, *Instructor*, *Material*, or *Other Resources*.
5. Enter data as required for the new resource type. Do so by maintaining the relevant infotypes via the tab strips.



Refer to the information contained for the individual infotypes under the section *Structure* in [Resource Type \[Page 81\]](#).

6. Choose

Result

You have created a new resource type.



Once you have created your first object, or if an object already exists in the system, you can use this as a template for any further objects you want to create. To do so, you enter the ID or name of the object you want to use as a template in the *Resource type* field in the *Copy from* box. The data of the existing object is proposed on the data screen. You can overwrite data as required for your new object. You can find this function in the master data catalog under *Create by copying*.



The Customizing settings made under [Maintain Actions \[Ext.\]](#) affect the data maintenance activities you can carry out for resource types. In this step, you specify what infotypes may be maintained for what object types.

Creating a Room

Use

In this step you create the resource *room*. In other words, you enter data for a physical room that exists in the system so that you can later reserve it for events.

Prerequisites

- Before you can create a room, you must create the resource type for the resource *room* and maintain all of the relevant availability indicators for it, including the *location-dependent* indicator where appropriate.

See also:

[Resource Type \[Page 81\]](#)

[Creating a Resource Type \[Page 84\]](#)

- You should also have already set up a building address for the building in which the room is located.

See also:

[Setting Up a Building Address \[Page 56\]](#)



If you have *Training and Event Management* and *Room Reservations* integrated, which means that you have a common plan version for both applications, you should create a resource type *Room* that is used in integrated operation by the two application components. You do this in Customizing for *Room Reservation Management* under [Define Initial Objects \[Ext.\]](#) In this way, you can access the same rooms from both *Training and Event Management* and *Room Reservations*.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* *Resource Management* *Room*. The *Room: Initial Screen* appears.

1. Enter the validity start date of the object in the *Validity* field.



For clarity's sake, you should enter 01/01/ of a calendar year.

2. If required, change the *status* of the new resource. The default status entered is *active*.



You can create the resource *room* in either *active* or *planned* status. *Planned* status is rarely used in *Training and Event Management*. You could, however, use *planned* status to indicate resources that have not yet been acquired.

3. Choose *Create Room*. The *Create Room: Data Screen* appears.

Creating a Room

4. Enter an abbreviation and a long name for the new resource.
5. Maintain the infotypes offered on the tab strips as required:

Relationships:

- *Belongs to location:*

Enter the location of the building here (town or city).



If you are using business event locations, this relationship is mandatory since otherwise the system cannot find the resources for reservation.

- *Is a specialization of resource type:*

Enter the relevant resource type for the resource here.

- *Is equipped with resource type:*

Enter the resource type that the room automatically contains here. This relationship is also used during the resource selection procedure. Example: a room is equipped with PCs.

- *Cost center assignment:*

Specify the cost center assignment of the resource if this data has not already been maintained for the resource type or if you want to override this value.

Capacity:

In the [Capacity \[Page 355\]](#) infotype, specify the minimum, optimum, and maximum capacity of the room if you have not already maintained this information for the pertinent resource type or if you want to override these values.

Address:

Assign the room to a building (see also [Setting Up a Building Address \[Page 56\]](#)) and enter telephone, fax, and room numbers.

Further information:

Maintain the [Costs \[Page 368\]](#) infotype for the room and specify cost items if you have not already maintained this information for the pertinent resource type or if you want to override these values.

6. Save your entries.

Result

You have created a room. You can reserve this room when you plan and create business event dates.

See also:

[Selecting Resources \[Page 111\]](#)

Creating an Instructor

Use

In this step, you create external instructors. These are persons whose data is not stored in HR Master Data (not employees) and who are assigned to object type H *External Person*.



It is not necessary to create internal instructors since their data is already stored in HR Master Data.

Prerequisites

Before you can create an instructor, you must create the resource type for the resource *instructor* and maintain all of the relevant availability indicators. Depending on whether your instructors are external or internal, you may have to create the relationship *is held by* between the object type and the event type in the *Availability Indicators* infotype when you create the resource type.



If your instructors are represented by different object types, for example, object type H for external and object type P for internal instructors, you should enter an asterisk (*) in the *Object type* field for the relationship A026 *is held by*. The relationship then applies to all object types.

See also:

[Resource Type \[Page 81\]](#)

[Creating a Resource Type \[Page 84\]](#)



If you use external instructors, you must first create the company to which they belong.

See also:

[Creating a Company \[Page 65\]](#)


Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Resource Management* → *External Instructor*. The *Create External Instructor: Initial Screen* appears.

1. Enter the validity start date of the object in the *Validity* field.



For clarity's sake, you should enter 01/01/ of a calendar year.

2. Choose . The *Create External Instructor: Data Screen* appears.
3. Enter the instructor's first and last names.

Creating an Instructor

4. Maintain the infotypes offered on the tab strips as required:

Relationships

- *Belongs to company:*

Enter the name of the company to which the instructor belongs.

- *Is instructor for event type:*


Enter the event types the instructor can hold.

Address

Enter address data as required.

Name format

Enter data such as *form of address, nationality, and title* that is used in the *Correspondence* function to format the instructor's name and address.

5. Choose .

Result

You have created an *external instructor* in the system. You can reserve this instructor to hold the events you plan and create.

See also:

[Selecting Resources \[Page 111\]](#)

Creating Other Resources

Use

In this step, you create resources that could be required for holding business events other than *rooms*, *instructors*, or *material* from the material master.

Prerequisites

- Before you can create an *other resource*, you must create the resource type *other resource* and maintain all of the relevant availability indicators for it.

See also:

[Resource Type \[Page 81\]](#)

[Creating a Resource Type \[Page 84\]](#)

- Before you can maintain the *Costs* infotype for resources, you must carry out the step *Defining Cost Items* in Customizing under *Business Event Preparation*.

See also:

[Defining Cost Items \[Page 53\]](#)

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Settings* → *Current Settings* → *Other Resources*. The *Resource: Initial Screen* appears.

1. Enter the validity start date of the object in the *Validity* field.




For clarity's sake, you should enter 01/01/ of a calendar year.

2. If required, change the *status* of the new resource. The default status entered is *active*.



You can create *other resources* in either *active* or *planned* status. *Planned* status is rarely used in *Training and Event Management* except for business events. You could, however, use *planned* status to indicate resources that have not yet been acquired.

3. Choose . The *Create Resource: Data Screen* appears.
4. Enter an *abbreviation* and a *long name* for the new resource.
5. Maintain the infotypes offered on the tab strips as required:

Relationships:

- *Is a specialization of resource type:*

You specify the relevant resource type (*other resource*) for the resource.

- *Cost center assignment:*

Creating Other Resources

Specify the cost center assignment of the resource if this data has not already been maintained for the resource type or if you want to override this value.

– *Belongs to location:*


Use this relationship for location-dependent resources to specify their location.

Capacity:

You only maintain this infotype for [rooms \[Page 85\]](#). It has no relevance here.

Further information:

Create the [Costs \[Page 368\]](#) infotype for the resource and specify cost items if this data has not already been maintained for the resource type or if you want to override this value.

6. Choose .

Result

You have created a room. You can reserve this resource when you plan and create business event dates.

See also:

[Selecting Resources \[Page 111\]](#)

Master Data Catalog

Definition

[Dynamic menu \[Page 16\]](#) you use to create and maintain the master data objects of *Training and Event Management* in a clearly structured hierarchy.

Use

The main function of the *master data catalog* is to enable you to create and maintain objects and their relationships.

The *master data catalog* provides you with a speedy way to create new master data objects. By simple cursor selection you can quickly indicate at what position you want to create a new object.

When you create a new object in this way, the relevant relationship with an existing object is automatically created as well.

There are two *Create* options:

- You can choose *Create (Same level / level down / by copying)* to create a new object and the relevant relationship in one go.



Select a business event group and choose *Object Create Level Down*. This automatically creates the relationship *incorporates* between the business event group and event type. From here, you access the data screen *Create Business Event Type*.

Once you have entered data for the new event type and saved your entries, you return to the master data menu.

You also have the option of creating new objects by copying from existing reference objects. You do so with the function *Create by copying*. The data of the existing object is proposed onscreen for the new object. You may overwrite data as required.

- You can choose *Create Relationship* to create a new relationship between two existing objects. In addition, you can use this function to move an object. You do so by relating the object with a different target object. The original relationship is delimited when you do this.



The function *Create Relationship* is particularly useful when you need to correct or change data already maintained.

For example, if the system does not propose the right resource types for reservation, this is often because the relevant relationships have not been maintained for the resource type in the [Availability Indicators \[Page 352\]](#) infotype or because the relationship *requires resource type* has not been maintained for the event type.

See also:


[Resource Reservation in Training and Event Management \[Page 105\]](#)

Master Data Catalog

Structure

Like the other dynamic menus of *Training and Event Management*, the *master data catalog* is hierarchically structured. The top level is occupied by business event groups, below which lie the event types assigned to these. All of the objects assigned to event types, such as event dates or resource types, occupy the underlying levels of the hierarchy.



If you want to display an overview of the object types and their IDs, you can choose  (*User-Specific Settings*) and on the *View* tab select the option *With key*. If you want to display the relationships, select *With additional information* as well.

Integration

You access the *Master Data Catalog* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Settings* → *Current Settings*.

You can also access the *master data catalog* in *Customizing for Training and Event Management* under *Business Event Preparation* → *Maintain Master Data via Catalog*.

See also:

[User-Specific Settings \[Page 19\]](#)

[Object Maintenance in the Dynamic Menus \[Page 26\]](#)

Changing/Displaying Objects

Use

This function lets you display and change the objects used in *Training and Event Management*.

Prerequisites

The object you want to display must exist in the system. In other words, it must have at least the *Object* infotype (1000) created for it.


Procedure

Enter the object that you want to change or display:

1. Go to the initial screen for data maintenance or select the required object in a dynamic menu where maintenance of the object is allowed (attendee maintenance in the dynamic *Attendance* menu) and choose the required editing mode:

-  *Displaying data:*

The object's data screen is displayed with the infotypes that have been maintained.


-  *Changing (Maintaining) data:*


A list of the infotypes that can be maintained for the object is displayed.



A green checkmark (✓) is displayed beside infotypes that have already been stored for the object.

There are two *change* options:

You can change an existing infotype. To do so, select the infotype and choose  *Change*.

You can create a new infotype for the object. To do so, select the infotype and choose  *Create*. The infotype data screen appears where you can enter data as required.

2.  Save your entries where relevant.

Result

You have displayed or changed object data.

Business Event Catalog

Business Event Catalog

Purpose

To be able to work with *Training and Event Management*, you must set up an initial business event catalog by planning or creating business event dates.

Once you have set up your catalog, you can carry out day-to-day activities such as booking attendees for business events.

You create the business event catalog in a hierarchical structure, consisting of business event groups, event types, and event dates which makes data maintenance structured and efficient.

Prerequisites

You must first create the necessary master data, which forms the basis of the business event catalog. The business event environment contains the following data:

- Schedule pattern
- Building address
- Cost items
- Business event location
- Organizer
- Resource types
- Resources



You create master data in one of the following places:

- In Customizing under *Business Event Preparation*
- Directly in the *Training and Event Management* application under *Current Settings*

See also:

[Business Event Preparation \[Page 51\]](#)

Process Flow

You create the business event catalog by setting up a hierarchical structure consisting of [business event groups \[Page 69\]](#), [event types \[Page 73\]](#) and [event dates \[Page 96\]](#). You create the hierarchy from the top down, starting with the business event groups.

First, you must create the following either in Customizing under *Business Event Preparation* or in *Current Settings*:

1. A business event group
2. A business event type that belongs to the business event group. When you create the event type, you must maintain the relationship *belongs to event group* so that the system can assign the event type to the event group.

Result

These objects form the required basis for setting up a business event hierarchy.



You should create a basic framework of business event groups, types and event dates first, which you can then extend as required. When you want to add new objects to the hierarchy, we recommend that you do so in *Current Settings* under [Master Data Catalog \[Page 91\]](#). The advantage of this is that objects are created directly in the hierarchy, so that you do not have to maintain the relevant relationships each time.

Once you have created business event types in the structure, you can create business event dates, thus completing your business event catalog.

See also:

[Business Event Dates \[Page 96\]](#)

[Creating a Business Event Date with Resources \[Page 108\]](#)

[Creating a Business Event Date Without Resources \[Page 103\]](#)

[Business Event Date Planning \[Page 115\]](#)

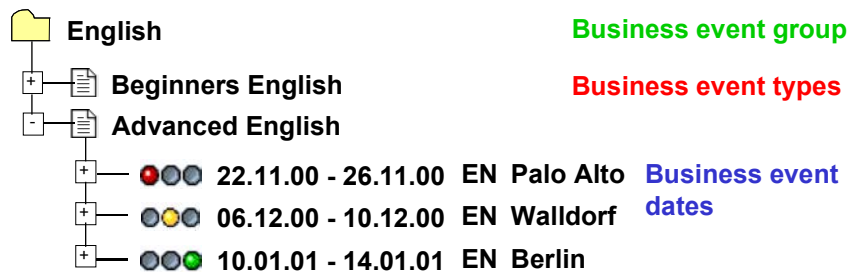
Business Event Dates

Business Event Dates

Definition

Training and Event Management uses the terms business event and business event date synonymously. A business event date is based on a blueprint or model business event type. In contrast to its event type, a business event date is an actual event scheduled to take place on a specific date in a specific language. It has a start and an end date.

Example:



Use

In *Training and Event Management*, you set up a business event catalog by planning or creating business event dates. Once you have created a business event date, you can make attendance bookings for it.

When you create a business event to be held on a specific date, you must first select a business event type on which to base it. You then enter various types of information for this business event date, such as the event location, or the resources required for it.

It is also possible to create data for a business event by using an existing one as a template to copy from.

When you use the planning function for event dates, you can plan multiple event dates in one step based on the demand that exists for the event.

See also:

[Creating a Business Event Date with Resources \[Page 108\]](#)

[Creating a Business Event Date Without Resources \[Page 103\]](#)

[Planning a Business Event Date \[Page 118\]](#)

Structure

When you create or plan a business event date, you store all of the data required for holding the event, such as:

- *Internal / external*

An *internal* business event is an event that your company is responsible for organizing.

An *external* business event is organized by a third-party organizer. You cannot *plan* an

Business Event Dates

external business event, which means that you cannot carry out resource reservation for it. You can only create event dates for it one at a time. When you plan event dates, internal event dates are automatically generated.

- *Status firmly booked / planned*

You can create event dates in one of two statuses: *firmly booked* (active) or *planned*. If you create a business event with the status *planned*, you can send attendees preliminary confirmation of registration. Later, when you change the status to *firmly booked*, you can send out definite confirmations. It makes sense to use this option if an event is being planned well in advance and may in fact be canceled before definite confirmations are issued. This allows you to cancel business events before you have definitively confirmed attendance bookings.

As well, when you change the status to *firmly booked*, waiting-list bookings can be converted to normal bookings, essential bookings, or prebookings.



If you create a business event with the status *planned*, you must change its status to *firmly booked* at some point. This is necessary so that follow-up processing can be done.

However, you can also create a business event with the status *firmly booked* from the start. If you do so, you send out definite confirmation once bookings are made on it.

See also:

[Firmly Book Business Event \[Page 226\]](#)

[Business Event Follow-Up Processing \[Page 230\]](#)

- *Locked*

You can create event dates in *locked* status. This means that no bookings can be made for these until they are unlocked.

See also:

[Lock/Unlock Business Events \[Page 124\]](#)

- *Business event location*

If you are using business event locations, you must enter a location.

You define locations in Customizing for *Training and Event Management* under [Create Location \[Ext.\]](#). You specify whether you wish to use business event locations at all in the step [Use of business event locations \[Ext.\]](#). If you have not set up locations, input is optional.

- *Language*

You must enter the *Language* in which the event is held.

- *Time schedule*

There are two possible ways to specify the actual *time schedule* of a business event.

- By copying the schedule (schedule model) defined for the business event type
- By creating your own schedule for the business event

Business Event Dates

For more information, refer to [Creating a Schedule \[Page 100\]](#).



You define the schedule patterns necessary for creating a time schedule in Customizing for *Training and Event Management* under [Define Time Schedule \[Ext.\]](#).

- *Number of attendees*

Information regarding the number of attendees ([capacity \[Page 355\]](#)) is automatically inherited from the business event type if this information is available. You can, however, specify a different capacity for the business event itself.

- *Price and cost assignment*

You can specify both an *internal price* for internal activity allocation purposes and an *external price* for billing.



If you want to determine a price for the business event, you can use the function [Determine price proposal \[Page 160\]](#) on this data screen by choosing

Cost assignment, which involves specifying a controlling area and a cost center, is required for cost transfer posting purposes.

- *Organizer*

You enter the *organizer* of the business event. You create organizers of the types *organizational unit* and *company* in Customizing for *Training and Event Management* under [Organizer \[Ext.\]](#).



When you create business event dates, you can store more information for them than when you use the planning function (such as *number of attendees*, *price and cost assignment*, and *organizer data*). When you use the *planning* function, data that has been maintained for the business event type is automatically transferred to the corresponding event date. If you want to override the data of the business event type for event dates you have planned, you can use the function [Change Business Event Date \[Page 114\]](#).

- *Further Information*

You can store descriptive or semantic information for a business event here, in the following subtypes of the *Description* infotype:

General Description, *Business Event Contents*, *Notes*.

In addition, you can create links from the event to external information objects using the following infotypes:

Knowledge Link: The [Knowledge Link \[Page 375\]](#) infotype lets you link the business event with objects in the SAP Knowledge Warehouse (such as training materials, CBTs, or videos).

Web Link: The [Web Link \[Page 374\]](#) infotype lets you link any URL addresses on the Internet that contain information that is relevant to the business event.



You can display the info objects that are linked with an event through the *Knowledge Link* and *Web Link* infotypes either on the data screen of the business event or in the Employee Self-Service (ESS) applications (if the event is listed in the ESS).

- *Resource selection and planning options*

When you create a business event, you can also reserve the resources that are required for it. Resource reservation is optional. You can create an event without reserving resources for it.

When you plan a business event, you make planning specifications regarding resource reservation. These specifications are used to reserve the required resources if available. You can reserve missing resources later with the function [Change Business Event Date \[Page 114\]](#).

See also:

[Creating a Business Event Date with Resources \[Page 108\]](#)

[Creating a Business Event Date Without Resources \[Page 103\]](#)

[Planning a Business Event Date \[Page 118\]](#)

[Business Event Types \[Page 73\]](#)

Creating a Schedule

Creating a Schedule

Use

This topic describes how to define a business event schedule when you create or plan a business event date. The time schedule you select determines the exact timetable for each day of the business event.



There are two options:

- You can copy the schedule of the business event type where available.
- You can create your own schedule for the business event, which you can base on either a predefined schedule pattern, a schedule without a pattern, or a user-defined schedule.





When you change event dates, you can also change the event schedule. Note that changing the schedule may cause problems with resource reservations. The resources you require for the new times may already be reserved elsewhere.

Procedure for Copying a Schedule



1. Check whether a schedule has been assigned to the event or event type that can be used as a reference from which to copy. For this purpose, you can use the functions  *display* and  *change* under *Schedule*. These functions let you adjust the schedule where necessary.




If the business event type does not have a schedule, the dialog box *Create User-Defined Schedule* appears where you can create your own schedule. For more information on creating a schedule, see below.

2. On the data screen under *Schedule*, select one or both of the following indicators:
 - a. Period containing no days off
If you select this indicator, the schedule for the event is positioned so that no days off or public holidays fall during the period. It may, of course, happen that the system cannot find a suitable date for the event as a result of this specification.
 - b. Include start day
If you select this indicator, the system proposes a business event date that starts on the day specified in your schedule where relevant.
3. If you want to copy the schedule of the business event type (without changing it), under *Schedule* choose  *Copy*. The *Select Schedule Model* dialog box appears displaying all of the subtypes of the *Schedule Model* infotype that have been created, such as *main schedule*, *alternative schedule*.
4. Select the schedule you want and choose .



If you decide to create your own schedule instead, in this dialog box do not choose , choose  *Create*. The further procedure is described below.

Procedure for Creating a Schedule

On the *Change business event* or *Create business event* data screen, under *Schedule* choose  *Create*. The *Create User-Defined Schedule* dialog box appears.

Choose one of the tab pages: *Schedule with pattern*, *Schedule without pattern*, *User-defined schedule*.


Schedule with pattern

On this tab page, you can use a predefined schedule pattern to create your own schedule.

1. Choose the possible entries help under *Schedule*. The *Time Schedule* dialog box appears with a list of all the schedule models defined including details of name, day number, start and end times.



These schedule patterns are created in Customizing for *Training and Event Management* or in *Current Settings* under [Define Time Schedule \[Page 55\]](#).

2. Select the schedule pattern of your choice and choose .
3. Under *Start day*, either select a specific day of the week if you want the event to begin on a certain day, or select *undefined*.
4. If the business event schedule is to be repeated several times, choose *Multiple (occurrences)*. Enter the number of recurrences in the *Number* field and specify at what intervals the dates should recur in either weeks or months in the *At intervals of* field. If you want the schedule repeated on a monthly basis, you can select 1st, 2nd, 3rd or last under *start day*.



Under *Schedule*, you select the two-day schedule pattern. This schedule consists of a time block 9:00 – 17:00 for each day of the event. Select **Monday** as the start day. You specify that the selected schedule is to recur **four** times at intervals of **one month**. Finally, you specify that the event should always begin **on the last Monday of the month**.

5. Choose *Enter*.



The system calculates the duration of the business event based on your specifications and displays this under *duration in days* and *duration in hours*. The following values are output for our example:


Duration: **8 Days** **64 Hours**

6. Choose .

Creating a Schedule

Schedule without pattern

On this tab page, you can create your own schedule in which you only specify the start day and the duration.

1. Specify the *duration* of the business event in days and hours.
2. Under *Start day*, enter a specific day of the week. Otherwise, the start day is *undefined*.
3. Choose .


User-defined schedule

On this tab page, you can create a user-defined schedule in which you specify the start day and where relevant recurrence specifications. Instead of using the predefined day schedules of a schedule pattern, you can define your own day schedules containing different day segments. These day schedules are repeated on a weekly or monthly basis depending on what you specify under *Multiple occurrences* (if you select this option).



1. Enter a day number in the *Day no.* field.
2. Use the possible entries help to select a *day segment* for the day number you entered.




These day segments consisting of up to three time blocks are created in Customizing for *Training and Event Management* or in *Current Settings* under [Define Time Schedule \[Page 55\]](#).

3. To display the individual time blocks of the day schedule, press *Enter*. The business event duration in days and hours is refreshed below the list.
4. Repeat this procedure to specify each day of the schedule.
5. Choose . You return to the data screen.

Result

You have created a schedule. On the data screen you can check and, if necessary, change the schedule by choosing  *Display* and  *Change* under *Schedule*.



The day data displayed when you choose  *Display* may change when you *plan event dates* or *create event dates with resources* once resources have been reserved and dates finalized.

See also:

[Creating a Business Event Date with Resources \[Page 108\]](#)




Creating a Business Event Date Without Resources

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Dates* → *Create* → *Without Resources*. The *Create Business Event Without Resources* initial screen appears.
2. Enter the *business event type* for which you want to create a business event.



If you call the function from the *dynamic business event menu*, the relevant data is read simply by positioning the cursor on the event type. The business event type is already selected on the initial screen.



3. In the *Start date* field, enter the start date. The default date proposed by the system is the current date. You can change the start date on the data screen if required.
4. Choose  *data screen*. The *Create Business Event Without Resources* data screen appears.
5. Select either *Internal* or *External* to specify what kind of business event you want to create.
6. Select either *Planned* or *Firmly bkd*.
7. Enter an *event location*.
8. Enter a *business event language*.
9. Assign a schedule to the business event. To do so, choose either  *Copy* to transfer the schedule defined for the event type or  *Create* to define your own schedule.

See also: [Creating a Schedule \[Page 100\]](#)



If the business event type does not have a schedule, a dialog box appears where you can create your own schedule.

If one or more schedules have been defined for the business event type, a dialog box appears displaying the existing schedules for selection.

Once you have copied or created a schedule, you can check or change it by choosing  *Display* or  *Change* under *Schedule*.

10. Enter all other data you require for your business event on the data screen. That is, data that you do not want to transfer from the event type or that was not maintained for the event type.





Refer to the information contained for the individual infotypes under the section *Structure* in [Business Event Type \[Page 96\]](#).

11. Choose .

Creating a Business Event Date Without Resources**Result**

You have created a business event.



Alternatively, you can create a new event date by copying from an existing event date. In this case, you enter no event type and choose . Enter the event date you want to use as a reference in the field under *Copy from*. Choose  *Data screen*. The data of the reference event date is displayed on the data screen. You can overwrite it as required. Note that the *Copy* function only lets you create event dates *without* the resource reservation function.

See also:

[Business Event Dates \[Page 96\]](#)

[Creating a Business Event Date with Resources \[Page 108\]](#)

Resource Reservation in Training and Event Management

Purpose

Training and Event Management has functions that let you manage, reserve, and settle costs for all of the resources required for holding training events and conventions.

Training and Event Management differentiates four classifications of resources. The various resource types are created and managed differently owing to their specific characteristics.

- [Rooms \[Page 85\]](#)
- [Instructors \[Page 87\]](#)
- [Materials \[Page 106\]](#)
- [Other resources \[Page 89\]](#)

These four categories enable you to classify and manage all the different types of resources you might require for your events.

Prerequisites

If you want to use resources of the type *Material*, you must have the component *Materials Management (MM)* installed and have activated integration between it and *Training and Event Management*. You do so in Customizing for *Training and Event Management* under [Integration Yes or No? \[Ext.\]](#)

Process Flow

1. You create the resource types you require and maintain the *Availability Indicators* infotype for each of them.
See also: [Creating a Resource Type \[Page 84\]](#)
2. You create the resources you require if they do not already exist on the database.
See also: [Creating a Room \[Page 85\]](#), [Creating an Instructor \[Page 87\]](#), [Creating Other Resources \[Page 89\]](#)
3. You set up your business event catalog by creating and planning event dates and reserving resources for them, where available.
4. **See also:** [Creating a Business Event Date with Resources \[Page 108\]](#) [Planning a Business Event Date \[Page 118\]](#) If you require a resource of the resource type *Material* from the material master, you trigger the [material procurement \[Page 106\]](#) operation.

Result

You have planned or created business event dates and reserved the required resources as far as possible.

Material Procurement

Material Procurement

Purpose

The *Material Procurement* function lets you reserve materials from the material master of the *Materials Management* component for your business events in *Training and Event Management*.

Prerequisites


- You have activated integration between *Material Management* and *Training and Event Management*. in Customizing for *Training and Event Management* [under Integration yes or no? \[Ext.\]](#)
- There must be materials stored in the material master that you can access.
- There must be resource types that you can assign to the resource *Material*. The *Availability Indicators* infotype must be maintained for these:
 - Material indicator
 - Relationship A054 *uses for attendee* for business event types with object type M or relationship A055 *uses for business event*.



If you use materials that are required for attendees and materials required for business events, you must create two resource types for the resource 'Material'. You must create the relevant relationships for these in the *Availability Indicators* infotype.

- You must create the same relationships for business event types for which you want to reserve *Material* resources. You maintain them under *Relationships*.
- Attendees must be booked for events of this type.
- The business event must be in *firmly booked* status.

Process Flow

1. In the *Dynamic Information Menu*, from the list of reports available for business events, you start the report [Material Requirements per Business Event \(RHXMARP0\) \[Page 341\]](#).
2. You enter the business event for which you require material and choose .
3. The report outputs the material requirements per business event in list form.
4. You reserve material by selecting a business event and choosing *Reserve material*.
5. The system checks material availability. Depending on the findings, it creates a reservation, a purchase requisition, or both in *Materials Management*.
6. A reference number is created for the reservation or requisition in *Training and Event Management*. You must *update* this reference number.
7. In the event of data inconsistencies (for example, due to missing organizational data), the system outputs an error log. You can use this log to correct errors, cancel the operation and start the report again.

8. If the reservation or purchase requisition runs without errors, you can double-click the reference number to display the original reservation document in *Materials Management* or the original purchase requisition document in *Purchasing*.

Result

You have reserved the material required for your event.

See also:

[Material Requirements per Business Event \[Page 341\]](#)

[Resource Type \[Page 81\]](#)

For information on the interface, refer to:

[Material Order in Training and Event Management \[Page 455\]](#)

[Business Process Flow of Material Order \[Page 458\]](#)

[Ordering Material \[Page 460\]](#)

[Checking a Material Order \[Page 461\]](#)

Creating a Business Event Date with Resources

Creating a Business Event Date with Resources

Use

This function lets you create a business event date and reserve the resources that are required for it.

Prerequisites


The relationship *requires resource type* must be maintained for the corresponding event type. If it is not, you can only create a business event without resources.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Dates* → *Create* → *With Resources*. The *Create Business Event with Resources: Initial screen* appears.
2. Enter the *Business event type* for which you want to create a business event date.



If you call the function from the *dynamic business event menu*, the relevant data is read simply by positioning the cursor on the event type. The business event type is already selected on the initial screen.



3. Enter the planning period as appropriate. You can change the period later on the data screen if required.
4. Choose  *data screen*. The *Create Business Event with Resources: Data Screen* appears. The system automatically completes the fields with data of the business event type.



The system automatically assigns the attribute *internal* since you can only reserve resources for internal business events.

5. Specify whether you want to create the business event in status *Planned* or *Firmly bkd* and *locked*.

See also: [Lock/Unlock Business Events \[Page 124\]](#)

6. Enter an *event location*.
7. Enter a *business event language*.
8. Assign a *schedule* to the business event. To do so, choose either  *Copy* to transfer the schedule defined for the event type or  *Create* to define your own schedule.



See also: [Creating a Schedule \[Page 100\]](#)



If the business event type does not have a schedule, a dialog box appears where you can create your own schedule.

Creating a Business Event Date with Resources

If one or more schedules have been defined for the business event type, a dialog box appears displaying the existing schedules for selection.

Once you have copied or created a schedule, you can check or change it by choosing  *Display* or  *Change* under *Schedule*.

9. Enter all other data you require for your business event on the data screen. That is, data that you do not want to transfer from the event type or that was not maintained for the event type.





Refer to the information contained for the individual infotypes under the section *Structure* in [Business Event Type \[Page 96\]](#).

10. Choose *Resource selection* to reserve the resources required for the event. The *Resource Selection: Overview* dialog box appears.





The following functions are available in the dialog box:

Change the *Planning period*, and change the *Proposed date* using  and . If you selected *Period containing no days off*, the system automatically proposes periods that do not contain days off (where possible).




Change the *event location*.

Resource types defined as *required* for the corresponding event type are displayed under *Resource requirements*. You select resources for the business event using the resource types.

If a resource type is only required for this specific event, you assign it temporarily by choosing .








You can create the relationship *requires resource type* with the business event type by choosing .

Choose *Auto resource assgmt* if you want the system to automatically allocate resources that are flagged as *required* to the business event (where available). If you want to use this function, select the resource types accordingly.

11. Choose  for any resource types you want to reserve manually. The *Resource selection* dialog box appears displaying details of the actual resources available (such as instructors' names) and details of their availability. There are two possible options.
 - a. You can select a resource that you want to reserve for the complete period of the business event. Then choose .
 - b. You can choose  *Detail selection* if you want to reserve different resources for specific days of the event or if one of the resources you require is only available for part of the event duration. The *Resource Detail Selection; Overview* dialog box appears. The individual reservation periods (time blocks) per day are displayed in this dialog box. You can reserve different resources for the different time blocks if required (depending on availability of course).

Creating a Business Event Date with Resources

The *detailed resource selection* option is only possible when more than one resource is displayed for selection.

- i. Choose . The *Resource Detail Selection* dialog box appears in which you can select a resource from the list for the period you require.
 - ii. Select the resource of your choice and choose . The *Resource Detail Selection: Overview* dialog box appears again.  is displayed behind the reservation time for which a resource has been reserved. Reserve all the resources for the times you require and then choose .
12. Continue choosing  in the dialog box until you return to the *Resource selection: Overview* screen appears.
 13. Repeat the same reservation procedure per resource type.
 14. Choose  on the *Resource selection: Overview* dialog box. The *Create Business Event with Resources: Data* Screen appears.
 15. Choose .

Result

You have created a business event and reserved resources for it where available.

See also:

[Business Event Dates \[Page 96\]](#)

[Creating a Business Event Date Without Resources \[Page 103\]](#)

Selecting Resources

Procedure

1. On the data screen, choose *Resource selection*. The *Resource Selection; Overview* dialog box appears in which the system displays a proposed date. You can change this date as required. You can bring it forward or move it back depending on resource availability and the options *Exclude days off* and *Include start day*.





The following functions are available in the dialog box:

Change the *planning period*




Change the *event location*.

Resource types defined as *required* for the corresponding event type are displayed under *Resource requirements*. You select resources for the business event using the resource types.

If a resource type is only required for this specific event, you assign it temporarily by choosing .


You can create the relationship *requires resource type* with the business event type by choosing .



Choose *Auto resource assgmt* if you want the system to automatically allocate resources that are flagged as required to the business event (where available). If you want to use this function, select the resource types displayed accordingly.

2. Choose  for any resource types you want to reserve manually. The *Resource selection* dialog box appears displaying details of the actual resources available (such as instructors' names) and details of their availability. There are two possible options.
 - a. You can select a resource that you want to reserve for the complete period of the business event. Then choose .
 - b. You can choose  *Detail selection* if you want to reserve different resources for specific days of the event or if one of the resources you require is only available for part of the event duration. The *Resource Selection; Overview* dialog box appears. The individual reservation periods (time blocks) per day are displayed in this dialog box. You can reserve different resources for the different time blocks if required (depending on availability of course).





The *detailed resource selection* option is only possible when more than one resource is displayed for selection.



Choose . The *Resource Detail Selection* dialog box appears in which you can select a resource from the list displayed for the reservation period you require.

Select the resource of your choice and choose . The *Resource Detail Selection; Overview* dialog box appears again.  is displayed behind the reservation time for

Selecting Resources

which a resource has been reserved. Reserve all the resources for the times you require and then choose .

Continue choosing  in the dialog box until you return to the *Resource selection: Overview* screen.



3. Repeat the same reservation procedure per resource type.
4. Choose  on the *Resource selection: Overview* dialog box:. The *Create Business Event with Resources: Data Screen* appears.
5. Choose .

Result

You have reserved the resources required for your business event date.

Displaying a Business Event Date

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Event Management* → *Business Events* → *Dates* → *Display*.
2. Enter the *Business event* you want to display.
3. Choose  *data screen*.
4. To display the time schedule of the business event, choose *Display Schedule* .
The system displays the following data for each day of the schedule: date, weekday, time, workday/day off. In the case of multi-session business events, the system displays the day schedule per session.
5. To display any resources reserved for the business event, choose *Resource list*. A list of the resources reserved appears with details on the reservation days per resource, the total number of days, and the time of reservation.


See also:

[Business Event Dates \[Page 96\]](#)

Changing a Business Event Date

Changing a Business Event Date

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Event Management* → *Business Events* → *Dates* → *Change*.
2. Enter the *Business event* you want to change.
3. Choose  *data screen*.



It is even easier to call this function from the dynamic *Business Event Menu*. There you simply select the event date you want to change and choose *Change* with the right mouse button.


4. Change data as required.

If you want to change the business event schedule, proceed as described in [Create Schedule \[Page 100\]](#)



Attendees who cannot attend on the new date are automatically rebooked for other events or prebooked for the event type. Attendees are notified of the change automatically if you have configured your *Correspondence* settings accordingly.

If you want to change or add to the resources selected for a business event, refer to: [Selecting Resources \[Page 111\]](#)

5. Choose .

Result

You have changed the business event date.

See also:

[Business Event Dates \[Page 96\]](#)

Business Event Date Planning

Use

When setting up your business event catalog, you can plan multiple business event dates at one go in the *dynamic planning menu* based on the demand that exists for them.



There are important differences between the functions *Plan* and *Create*. When you *plan* business events, you can plan a number of event dates simultaneously. With the *Create* function, you can only create event dates one at a time.

The result of both transactions is the same: in both cases, the new event date is included in your business event catalog.

The special feature of the planning function is that it includes an *automatic demand determination* function. The number of dates you plan depends on the demand that there is for them. This can be determined before you start the planning procedure.

Features

- *Demand Determination*


In the *Planning* menu, you can determine what demand there is for the event you want to plan. Demand can be derived from the bookings for the previous year, from the demand the previous year, or from the number of prebookings for the event type so far.


See also: [Demand Determination \[Page 121\]](#)


- *Generate date proposals automatically*

You can automatically generate date proposals when you plan event dates.

You can specify a number of other conditions such as:

- The business event location. No entry is interpreted as *all business event locations*. (If you make no entry, you must specify the locations for which you want event dates planned before the planning operation is executed.)
- The business event language. No entry is interpreted as *all business event languages*. (If you make no entry, you must specify the languages for which you want event dates planned before the planning operation is executed.)
- Calendar-specific conditions such as *days off* (in other words, the system only proposes event dates that do not include days off or public holidays).
-  *Selection: Resource Types/Resources* lets you make more detailed specifications for the resources required in this planning operation. You do so in the dialog box that appears (similar to the one that appears for resource selection when you create individual event dates).

If a resource type is only required for this specific planning operation, you assign it temporarily by choosing .

You can create the permanent relationship *requires resource type* with the business event type by choosing .

Business Event Date Planning

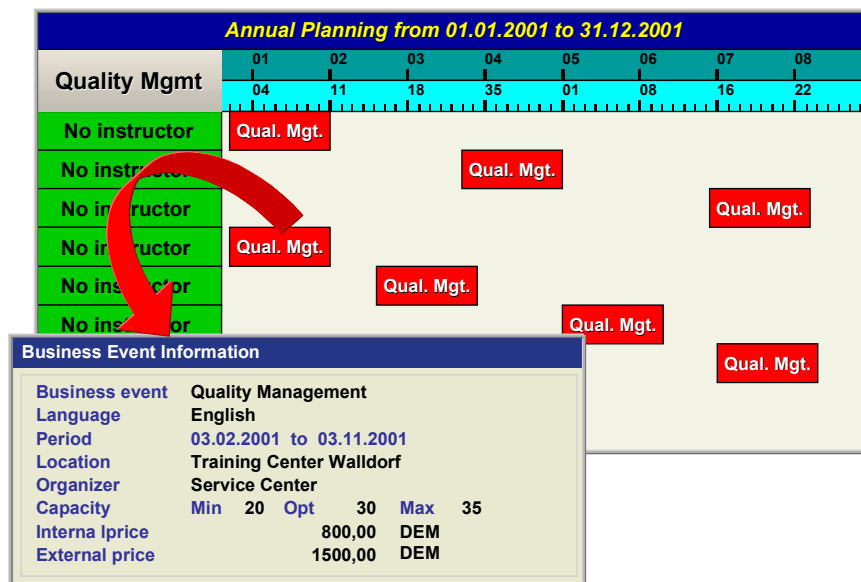
- The option *Cover resource requirements* lets you specify that the system should only propose dates on which all of the resources flagged as *required* are available.
- Dates should be *evenly spaced* over a specific period or should be *spaced at specific intervals* from one another.

Where possible, the system proposes a number of dates based on the conditions you set. It may however occur that there are no dates to satisfy the conditions. In this case, you can remove or change some of your conditions and restart the planning process.

- *Output a planning chart (in graphic or list form)*

The proposed dates are displayed on a graphical planning chart. You can move, copy, delete, or change the dates. You can display the resource list and time schedule of individual event dates, and you can change resource reservations for events. You can display planned event dates in list format.

Planning Chart:



- *Planning menu: Display demand using traffic light icon beside event type*

When you have determined demand for a particular business event type, a traffic light icon is displayed beside it indicating the following statuses:

- A red light indicates that no business event dates have been planned for the event type so far.
- A yellow light indicates that some event dates have been planned but the demand is not yet fulfilled.
- A green light indicates that a sufficient number of dates have been planned to fulfill the demand.

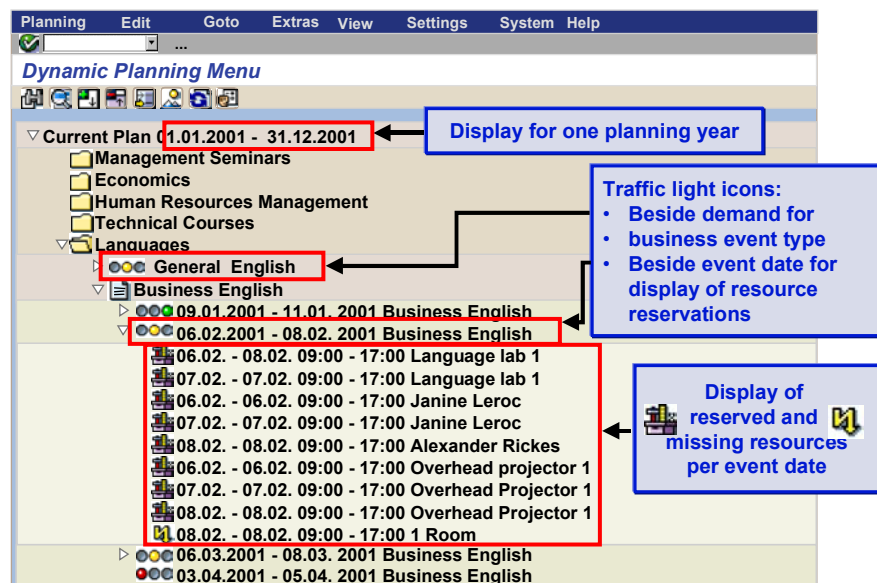
- *Display resource reservation using traffic light icon beside event date*

A traffic light icon appears beside the date proposals and event dates indicating the status of resource reservations as follows:

Business Event Date Planning

- Red indicates that no resources have been reserved so far.
- Yellow indicates that resource requirements are not fully covered.
- Green indicates that the planned events have sufficient resources reserved.

Dynamic Planning Menu



- Change data manually from the Planning Menu structure

Business Event Date Planning

The dynamic *Planning* menu presents data in a clear structure. You can manually change data in the structure. For example, if you discover that the resources assigned to the event do not cover resource requirements, you can remedy this on the planning menu screen.

- *Repeat planning process*

You can start the planning as often as you want by changing the demand for event dates.

See also:

[Business Event Dates \[Page 96\]](#)

[Planning a Business Event Date \[Page 118\]](#)

Planning a Business Event Date

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Menu* choose *Human Resources* → *Training and Event Management* → *Business Events* → *Dates* → [Planning menu \[Page 36\]](#).
2. Select the *Business event type* for which you want to plan a business event date.
3. Choose *Planning* → *Create*. The *Plan Business Event: Initial Screen* appears, displaying the data of the event type:
4. Enter the *planning year* and the *quarters* for which you want to plan events.
5. Enter the *business event language*.
6. Enter a *location* as appropriate.





Do not enter a location if you are planning events for multiple locations simultaneously. You assign the event you are planning to a location when you edit the demand data (where specification of a location is a required entry).

7. Select either *Planned* or *Firmly bkd*.
8. Under *Schedule*, select one or both of the indicators *Period containing no days off* and *Include start day* as required.



As a result of your time specifications, it may happen that no suitable date can be found or fewer than required to meet the demand.


9. Assign a *schedule* to the business event. To do so, choose either  *Copy* to transfer the schedule defined for the event type or  *Create* to define your own schedule.

See also: [Creating a Schedule \[Page 100\]](#)



If the business event type does not have a schedule, a dialog box appears where you can create your own schedule.

If one or more schedules have been defined for the business event type, a dialog box appears displaying the existing schedules for selection.

Once you have copied or created a schedule, you can check it by choosing  *Display* under *Schedule*. Once the planning operation is completed, you can change the schedule for individual event dates if required.


10. Set conditions pertaining to the resource reservation if required.

If you want to ensure that only event dates are created where the resource requirements are covered, select the relevant indicator.

Planning a Business Event Date





As a result of your time specifications, it may happen that no suitable date can be found or fewer than required to meet the demand.


11. If you want to specify what resource types are to be reserved for your events, choose  *Selection: Resource Types/Resources*.






Resource types defined as *required* for the corresponding event type are displayed under *Resource requirements*. You preselect resources for your business events using the resource types.


If a resource type is only required for this specific planning operation, you assign it temporarily by choosing .

You can create the permanent relationship *requires resource type* with the business event type by choosing .


This function also lets you specify a preference as to what resources of a resource type are reserved during planning. To do so, choose  beside the resource type. This takes you to the *Resource Preselection* dialog box where you can select a specific resource per resource type.

If you want to specify the reservation days or times for specific resources, you can access the schedule model by choosing  beside the resource. Select the required fields. Then choose  in all dialog boxes to return to the *Plan Business Events Initial Screen*.

12. Where relevant, specify what interval should be between the event dates. There are two possible options.
 - a. You can determine that the event dates are evenly spaced over the planning period by selecting *Evenly spaced*.
 - b. You can determine that the interval between the event dates is always the same by selecting *Equidistant*. You must also enter a time interval in days and weeks in this case.
13. Choose  *Plan*. Either the *Change Business Event Demand* or *Create Business Event Demand* screen appears, depending on whether demand data already exists or not.

You can now change the existing demand by choosing *New Entries* or you can delete individual entries by choosing . When you have changed the demand data as required, there are two options for proceeding:

Choose *Transfer* if you want to use these demand figures as the basis for the current planning, but do **not** want the figures to be saved on the database, overwriting the previous demand values stored there.











Choose  if you want these demand figures to overwrite the existing demand values on the database.

For information on how to create new demand, refer to [Derermining Demand \[Page 123\]](#).

When you choose *Transfer* or , the *Gantt Chart: Annual Planning* screen appears displaying all of the event dates determined in the planning process.

Planning a Business Event Date

14. Change data as required in the event dates displayed. The following options are available:

- | | |
|---|--|
|  | Move business event |
|  | Change business event |
|  | Copy business event |
|  | Delete business event |
| <i>Resource selection:</i> | Reserve resources |
|  <i>Resources</i> | Display resource list per business event |
|  <i>Process Flow</i> | Display time schedule of business event |
|  <i>Process Flow</i> | Change time schedule |
|  | Expand display |
|  | Decrease display |
|  | Output in list format |

15. Choose .

Result

You have planned event dates based on the demand and made any changes required.

Demand Determination

Demand Determination

Use

The *Demand Determination* function is a decision support tool. It enables you to plan and schedule business events on the basis of the demand that exists for them.

Demand for a business event is calculated using data that is already in the system. The system proposes a specific number of events to be planned and scheduled based on this data, making your event planning more efficient.

Integration

The *Demand Determination* function is coupled directly with the planning function in *Training and Event Management*.

Prerequisites

Data regarding at least one of the following areas must be available for the business event type you are planning:

- a. Prebookings
- b. Bookings from the previous year
- c. Demand in the previous year



If none of the above data is available, you can define the demand yourself so that you can use the planning function at all.

Features

- *Demand determination based on existing data*

You can determine demand for a business event based on the prebookings received within a specified time period (or in the planning year if you specify no period), or on the bookings made the previous year. A third option is simply to base your planning on the demand figures from the previous year.

- *Change or modify the method of demand determination*

You can modify the methods used to determine demand by:

- a) Combining the methods. If you select more than one of the methods, the resulting demand figures are added together.
- b) Specifying a percentage by which the demand can be adjusted up or down.
- c) If you use the prebookings as the calculation basis but anticipate further prebookings in the near future, you can specify a percentage by which the resulting demand can be increased.



You want to find out the mean (average) of the three different methods. To do so, you select all three options. Since you do not want the results to be added, you enter

Demand Determination


66.6- in the percentage plus or minus field. This will result in **33.3** percent of each of the three results being taken.

- *Demand displayed beside event type*

The demand determined is displayed beside the business event type in the planning menu.

- *User-defined demand*

If a business event type is new and there is no relevant data on which to base demand figures, you can define demand yourself.

To do so, you execute the demand determination function and select any of the three options. Once you choose  and the system is unable to determine demand because there is no data on which to base it, the dialog box *Create Demand* appears. You can create demand statistics there yourself by choosing *New entries*.


- *Modify demand determined*

You can modify the demand figures that the system calculates.

When you choose *Plan* or *Change Demand*, the *Change Demand* dialog box appears displaying the demand statistics on which the planning is being based.

You can change this as required by overwriting it. You can also add new demand by choosing *New entries*. You can then save your entries or transfer them by choosing the relevant function.

If you choose *Transfer*, the new values are taken for the current planning operation only.

If you choose , your entries are saved and recorded on the database.

See also:

[Determining Demand \[Page 123\]](#)

[Business Event Date Planning \[Page 115\]](#)

Determining Demand

Determining Demand


Prerequisites

There are prebookings for a business event type (in the period you specified) and/or previous year's bookings and/or demand data from the previous year.

See also:

[Demand Determination \[Page 121\]](#)

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Menu* choose *Human Resources → Training and Event Management → Business Events → Dates → [Planning menu \[Page 36\]](#)*.
2. Select the business event type for which you want to determine demand.
3. Choose *Create demand*. The *Create Demand: Options* dialog box appears in which you can specify what method of demand determination you want to use: Based on
 - **prebookings** made for the event type in a time period specified by you. (If you specify no specific time period, the system automatically takes the planning year.)
 - **bookings from the previous year**
 - **previous year's demand**
4. Select the required method or combination of methods.
5. If required, enter a percentage plus or minus by which the demand figures can be modified.
6. Choose .

Result:

The demand for the business event is displayed in the planning menu.

A traffic light icon beside the business event type indicates whether the demand is covered or not.



If a business event type is new and there is no relevant data on which to base demand figures, you can define a demand yourself. The *Create Demand* dialog box appears where you enter the demand yourself.

See also:

[Demand Determination \[Page 121\]](#)

[Business Event Date Planning \[Page 115\]](#)

Lock/Unlock Business Events

Use

Locking a business event temporarily closes the attendee list. You can lock both internal and external business events in both planned and firmly booked status.

Unlocking a business event releases it for bookings again.

Prerequisites

For *locking*:

The business event may not be

- locked.
- Canceled.
- Historically recorded.

For *unlocking*:

The business event may not be

- Unlocked.
- Canceled.
- Historically recorded.

Result

When you lock a business event, a lock flag is appended to the *Business Event Info* infotype (1026).

Locked business events no longer feature in the business event catalog. This means that no further bookings are possible on this business event.

When you unlock a business event, the lock flag is removed from the *Business Event Info* infotype (1026).

Unlocked business events are included again in the business event catalog, which means that it is possible to make bookings for them.



Unlike canceling, locking a business event is not final or irrevocable. The business event can be unlocked again.

See also:


[Locking a Business Event \[Page 125\]](#)

[Unlocking a Business Event \[Page 126\]](#)

Locking a Business Event

Locking a Business Event

Procedure


1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Lock/Unlock*.
2. Enter the business event you want to lock.
3. Choose .

See also:

[Lock Business Events \[Page 124\]](#)

Unlocking a Business Event

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Lock/Unlock*.
2. Enter the business event you want to unlock.
3. Choose .

See also:

[Unlock Business Event \[Ext.\]](#)

Lock/Unlock Resources

Lock/Unlock Resources

Use

This function enables you to lock rooms and other resources to prevent other users from editing them. When you lock resources for a certain period, they are no longer available for selection during this period.

This function is useful, for example, when resources need to be repaired or serviced.

It may be necessary to temporarily lock a room that is to be renovated. In this case, you would lock the room for the period of the renovation.

Integration

The function *Lock Resources* is used in the application components *Room Reservation Management* and *Training and Event Management*.

Prerequisites

To use this function, you must define an initialization object type in Customizing.

For further information, refer to the Implementation Guide for *Room Reservations* under [Define Initial Objects \[Ext.\]](#).

Features

- You can lock all resources, not just rooms with this function. You can also display all reserved resources.
- You may only lock resources for periods during which they are not reserved. If the lock period you define contains days on which the resource is already reserved, the lock is only active on the non-reserved days.
- Locks are effective for whole day periods, not for specific time blocks on a specific day.

Activities

You must specify the resource you want to lock and the time period. The system locks the resource for the required period.

See also:

[Locking Resources \[Page 128\]](#)

[Unlocking Resources \[Page 129\]](#)



Locking a Resource

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Resource* → *Lock/Unlock*.
2. The *Lock/Unlock Resource* screen appears.
3. Enter the resource you want to lock.
4. Enter a selection period.



The selection period you specify determines what reservations and locked resources are displayed. The period you specify should be long enough to ensure that any reservations that may exist are displayed.

5. Choose . The system displays any existing reservations.
6. Enter the required lock period.
7. Choose  *Lock*.

Result

The system locks the resource and displays the start and end dates of the lock period. The locked resource is not available in the lock period from 00:00 to 00:59:00 o'clock.

See also:

[Lock/Unlock Resources \[Page 127\]](#)

Unlocking a Resource

Unlocking a Resource

Prerequisites

There must be locked resources.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Resource* → *Lock/Unlock*. The *Lock/Unlock Resource* screen appears.
2. Enter the resource you want to unlock.
3. Enter a selection period.




The selection period you specify determines what reservations and locked resources are displayed. The period you specify should be long enough to ensure that the required lock period is displayed.

The system displays existing locked resources.

4. Select the relevant lock period.



You can delete a number of locks at the same time. To do so, select the relevant lock periods.

5. Choose  *Unlock*.

Result

The resource is now unlocked and is available for resource selection and room reservations.

See also:

[Lock/Unlock Resources \[Page 127\]](#)

Multi-Session Event/Convention

Definition

A business event consisting of a main event comprising a number of sessions running in parallel, such as a convention.

Use

You can use multi-session events to create complex events containing several tracks, each track with a number of sessions running in parallel.

Structure

A convention or multi-session event is made up of a main event, divided into sessions. Each session has a unique name and is in itself a separate event. The example below illustrates how the structure of a single-session business event differs from that of a multi-session event.

	Single-session business event	Multi-session event
<i>Business event type</i>	Organization & Planning	SAP HR Convention
<i>(Main) business event:</i>	Organization & Planning 1	SAP HR Convention 2000
<i>Session</i>		Personnel Administration
		Recruitment
		Personnel Development
		Personnel Cost Planning

See also:

[Convention Management \[Page 131\]](#) [\[Page 131\]](#)

Management of Multi-Session Events and Conventions

Use

This function enables you to create multi-session events with several parallel sessions in *Training and Event Management*.

Prerequisites

You must select the indicator *Convention* in the *Business Event Type Info* infotype when you create the relevant business event type.



You cannot use the planning function for a convention. You must create a convention using the corresponding business event type.

Features

- You assign a specific schedule to each session of the event. In contrast to single-session events where you can adopt the schedule stored for the business event type, with multi-session events you must define the day schedule of each session individually. This involves specifying time blocks or intervals during the day.
- You can allocate resources to the individual sessions as you do with single-session business events.



Once you have created a convention, you cannot change any of the data for it. For example, you cannot change the resource reservation specifications.

- You can book attendees for the main event.



You cannot book attendees for the individual sessions.

There is no integration with *Time Management* for conventions. For this reason, no attendance records are written to *Time Management* for attendees.

Activities

1. You specify a date for the main event.
2. You assign unique names to the different tracks or sessions to differentiate them from one another.
3. You maintain the day schedules for the various sessions when you create the business event dates of the main event in the dialog box *Create/Change Day Schedules*.

See also:

[Multi-Session Event/Convention \[Page 130\]](#)

Business Event Brochure

Use

In *Training and Event Management*, you can create a brochure containing selected business event types, groups, and where relevant, business event dates. The business event brochure lists details of the events currently offered in your catalog.

Integration

You create the brochure by starting the report of the same name in the *dynamic information menu*. This report is listed among the reports available for business events. Alternatively, you can access it in either the *dynamic attendance menu* or the *dynamic business event menu* under *Extras*.

Here, you can select the data you want included in the brochure. The report then reads the relevant information from the infotypes and relationships stored for the event types and groups.

For example, for the contents of the business event the report reads infotype 1002, subtype 0002 stored for the event type.


Prerequisites

There must be business event types and groups maintained in the selection period that can be included in the brochure.

Features

- You can select which event types and groups are included in the brochure.
- You can ascertain whether all of the infotypes you want included in the brochure have, in fact, been maintained.
- You can maintain any missing information.
- You can include business event dates in the brochure.
- You can create a table of contents.
- You can download the brochure into WinWord for further editing.
- You can update the brochure once you have made your final changes.
- Print the brochure.

Activities

1. In the dynamic *Information* menu, choose *Business events* and select the report *Business event brochure*. The report's selection screen appears.
2. Select parameters to indicate the data you want included in the brochure.
3. Choose . The business event brochure is created.
4. Check the information output for any missing information, which you can add by maintaining the relevant infotypes.
5. Print the brochure.

See also:

[Business Event Brochure \(Report RHKBRO00\) \[Page 321\]](#)

Activity Allocation and Billing

Purpose

This process comprises all of the functions for settling fees in *Training and Event Management*, as well as the functions for recording costs and cost transfer posting. In addition, this describes all other functions that are in any way connected with fee processing in *Training and Event Management*. This includes the following functions:

- [Billing \[Page 136\]](#), which involves creating invoices and credit memos for attendance and cancellation fees
- [Internal Activity Allocation \[Page 143\]](#), which involves settling attendance and cancellation fees and instructor costs
- [Cost Transfer Posting \[Page 151\]](#), which involves transfer posting of event costs in which the cost center of the resource is credited and the cost center of the organizer is debited
- [Price Proposal \[Page 156\]](#), which involves calculating a price proposal on the basis of the cost items stored for a business event. The proposed price can be adopted as the event price.
- [Budgeting \[Page 161\]](#), which involves creating a training and education budget for organizational units and comparing budgets with the actual costs accrued for attendance fees

Billing

Use

The report RHFAKT00 lets you bill attendees with the fees for a business event by issuing an invoice via the billing interface.

During this process, the attendee's address is taken from the attendee data stored for one-time customers. The billing price is transferred to the *Sales and Distribution* component (SD).

Integration

You activate integration to *Billing* in Customizing for *Training and Event Management* under [Billing \[Ext.\]](#).

If you want to use the payment card functions, you must make the required settings in *Sales and Distribution* under *Billing* → [Payment Cards \[Ext.\]](#).

Prerequisites

- Attendance must be flagged as relevant for billing. You make this assignment when you execute the function *Book/Payment Info*. If you make no assignment here (and book attendance without fee assignment), the billing settings maintained for the attendee type in Customizing under [Specify Attendee Type Con \[Ext.\]](#) [trol \[Ext.\]](#) apply.

See also:

[Book Attendance with Payment Info \(with Dialog\) \[Page 193\]](#)

- The address of the *one-time customer* must be available.
In the case of a one-time customer, the address must be stored with the attendee. SAP recommends that you use the object type H (*external person*) for one-time customers since you must store the address for attendees of this type.
- The customer master record must be in the [sales area \[Ext.\]](#) of the business event.

Features

- Billing documents are generated in *Sales and Distribution* (SD) via the billing interface and, where relevant, posted to *Cost Accounting* (CA).
- The system reads the address for the invoices from the customer master record or, in the case of one-time customers, from the address stored for the attendee.
- In the event of errors in the billing document, you can cancel (reverse) the document and start the billing procedure once again.
- All billing and activity allocation operations are logged with a reference document number. You can switch between the reference document and the original document by choosing *View*. Details of net amounts and tax amounts are stored in *Training and Event Management* for your reference.
- You can create credit memos to credit customers with amounts.

Billing

- When you book attendance and choose *Book/Payment Info*, you can specify different [partner functions \[Ext.\]](#) in the *Fee and Assignment* dialog box: [the sold-to party \[Ext.\]](#), [the bill-to party \[Ext.\]](#), [the payer \[Ext.\]](#) and [the ship-to party \[Ext.\]](#).
- You can use payment cards in the billing process. If you do so, you must enter the card number, card type and validity data in the *Book/Payment Fee* dialog. A card check is performed. If the card is validated, you must authorize the card. When the billing report is executed, the invoiced amount is automatically debited from the payment card.

Selection

You can set parameters to determine the data output by the report.

Objects or Business event selection (pre-report)

There are a number of ways to start the report:

- a. Enter one or more *business event groups*. The system finds all of the business events belonging to the specified group(s) and lists the attendees.
- b. Enter one or more *business event types*. The system finds all of the business events and attendees belonging to the specified type(s).
- c. Enter one or more *business events*. The system lists the attendees relevant for billing.

Reporting period

You can specify any period for which you want to determine attendees for billing.

List output


You can specify what data you want output in the list (such as, attendees not yet billed).

You can select the indicator *Hide non-relevant* to specify that business events for which the report finds no results are not displayed in the list.


Billing date

The date in this field indicates when billing should be carried out in SD, in other words, the settlement period. The default date for the billing is usually the *current date*. You can overwrite this date as required.

Standard selection screen (only pre-report RHXFAKT0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHFAKT00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The system displays a list of the selected attendees per business event and the following information:

- Business event
- Attendee

- Organizational assignment
- Sold-to party
- Bill-to party
- Attendance fee
- Credit memo amount (where relevant)
- Invoice number (if billing was already performed)
- Credit memo number (if credit memo was already generated)
- Card type (for billing with payment cards)
- Valid-to date of the payment card authorization

You can perform **billing** from the *list screen*:

If you select the attendee you want to bill and choose *Create billing document*, the relevant billing data is transferred to SD.

The following process flow takes place:

1. A validation check is performed on the document items. If the items are validated, a reference document is generated with the status *transfer designated*.
2. The BAPI for billing is called.
3. The status of the reference document is changed to *transfer effected* (yellow/amber light).
4. Due to the fact that the systems may be decoupled (SD and PE in distributed systems), confirmation of this transaction is necessary to ensure that the transaction has actually been executed.

For this purpose, you must call the function *Compare document*. The system searches for the original SD document.



It is only possible to further edit attendee data, for example, to make a cancellation, when the billing operation has been confirmed using the function *Compare document*.

If the original document is found, the status of the reference document changes to *Transfer confirmed* (green light). You can display the original document by choosing *View → Ref. <-> Original document*.

If the original document cannot be found, the status of the reference document changes to *Transfer incorrect* (red light).



For more information on the procedure when the original document cannot be found, refer to *Error diagnosis* in note 161511.

You can execute the following functions from the list screen:

- Create credit memos
- *Check billing data*

Billing

- *Display the document flow* for the business event, in other words, all of the relevant allocation data that exists for the business event.
- *Display the document flow* for the attendee, in other words, all of the relevant allocation data that exists for the attendee. (The cursor must be on the relevant attendee for this.)
- Display document (reference document)
- Display error log (confirmations of check/execution of billing)
- *Cancel document*: In the event of errors in the billing document or credit memo, you can cancel (reverse) the document and start the billing or credit memo procedure once again. This process is equivalent to generating a new document.
- *Change fee and assignment* of **not yet billed** attendee
- *Attendee list*
- *Cancellation list*



If you are performing billing in distributed systems (HR and LO in different systems), please note the information contained in:

[Set Up Business Event Billing \[Ext.\]](#)

If you use the attendee types *customer* and *contact person*, you should also note the information contained in:

[Business Event Attendees: Set Up Customers \[Ext.\]](#)

[Business Event Attendees: Set Up Contact Person \[Ext.\]](#)

See also:

[Billing Business Events \[Page 140\]](#)

[Creating Credit Memos \[Page 142\]](#)

For information on the interface, refer to:

[Business Event Billing \[Page 439\]](#)

[Business Process Flow of Billing Business Events \[Page 443\]](#)

[Performing Business Event Billing \[Page 445\]](#)

[Checking Billing of Business Events \[Page 446\]](#)

[Canceling a Billing Document \[Page 447\]](#)

Billing Business Events

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Billing*. The billing report selection screen appears.
2. Specify whether you want to start the program with a *business event*, a *business event type*, or a *business event group* by selecting the relevant option.
3. In the *Object ID* field, enter the details according to your selection in step 2. You can make a multiple selection if required.
4. Enter the *reporting period*.
5. Select either *All attendees*, *Already billed*, or *Not yet billed* attendees.
6. Select either *With cancellations*, *Without cancellations*, or *Only cancellations* for the list output.
7. Where relevant, change the *Billing document date*. (This is the date on which the billing should be performed.) The default date proposed by the system is the current date.
8. Choose *Execute*. A list screen appears displaying attendees according to the specifications you made on the selection screen (for example, *attendees not yet billed*).



You may now change date if required. You can change the amount to be billed, any other data relevant to the billing, or the *settlement type*. For example, you might want to change the settlement type from *billing* to *activity allocation*.

9. In the list displayed, select attendees to be billed and choose *Check/Simulation*. The billing document data is transferred to *Sales and Distribution*, where it is checked for completeness.



If billing data is missing, an error log is output which you can use to maintain the missing data. You must maintain all missing data before attendance can be billed.

Address data must be available for *one-time customers* before checking or billing can be performed.

10. Choose *Create billing document*. The *Training and Event Management* system creates a reference document and transfers the complete billing data to *Sales and Distribution* where billing is executed.
11. If you want to check the status of the billing and then complete it, select the reference number of the billing and choose *Compare document*.
12. If the billing was successfully performed, the system will display the document information from *Sales and Distribution*.

Result

You have performed billing for attendance fees.

Billing Business Events



If there were errors during the billing process, you can display the *document flow* and an *error log* that you can use to correct the errors before restarting the billing process.

Once billing has been completed (successfully or with documented errors), you can cancel the billing document. To do so, choose *Extras* → *Cancel document*.

See also:

[Billing \[Page 136\]](#)

For information on the interface, refer to:

[Business Event Billing \[Page 439\]](#)

[Business Process Flow of Billing Business Events \[Page 443\]](#)

[Performing Business Event Billing \[Page 445\]](#)

[Checking Billing of Business Events \[Page 446\]](#)

[Canceling a Billing Document \[Page 447\]](#)

Creating Credit Memos

Use

You use this function to create credit memos for attendance fees (whole or in part) that have already been billed in *Training and Event Management*.

Prerequisites

Attendance fees must have already been successfully billed.

Procedure

13. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Billing*. The selection screen of the billing and credit memo program appears.
14. Specify whether you want to start the program with a *business event*, a *business event type*, or a *business event group* by selecting the relevant option.
15. In the *Object ID* field, enter the details according to your selection in step 2. You can make a multiple selection if required.
16. Enter the *reporting period*.
17. Select *already billed attendees*.



Since you can only create credit memos for attendance fees that have already been billed, any other selection for list output would result in an error message.

18. If required, change the *billing document date*. In this case, it refers to the date the credit memo should be created. The default date proposed by the system is the current date.
19. Choose *Execute*. A list screen appears displaying attendees that have been billed for the selected business event.
20. Select the attendees for whom you want to create credit memos and choose *Create credit memo*.
21. A dialog box appears in which you can specify the amount (whole or part) to be credited.
22. Save your entries.

Result

You have created a credit memo.

Internal Activity Allocation

Internal Activity Allocation

Use

You can carry out internal activity allocation to settle fees for business events attended by employees of your company and costs for instructor function in *Training and Event Management*.

Integration

Activity allocation is carried out via integration with *Cost Accounting (CO)*.

You activate integration with *Cost Accounting* in Customizing for *Training and Event Management* under *Integration* [Activity Allocation \[Ext.\]](#).

Prerequisites

For allocating attendance fees:

- Attendance should not be free of charge.
- The attendee may not be on the waiting list.

For allocating instructor function:

- Cost items must be maintained for the resource type 'Instructor'.

For allocating attendance and instructor function:

- Cost center assignment must be maintained.
- The receiving cost center must be maintained.
- The sender cost center must be maintained.
- Sender and receiving cost center must be in the same controlling area.
- The activity type must be maintained and planning created for the activity type in the sender cost center.

Features

- You can allocate costs for attendees and instructors.

In activity allocation for attendees, the cost center of the cost object (the sender cost center) is credited and the attendee's cost center (the receiving cost center) is debited.

In activity allocation for instructors, the reverse procedure takes place. The cost center of the cost object (the receiving cost center) is debited and the instructor's cost center (the sender) is credited.

- All billing and activity allocation operations are logged with a reference document number.



It is only possible to further edit attendee data, for example, to make a cancellation, when the activity allocation operation has been confirmed in the target system using the function *Compare document*.

Internal Activity Allocation

- You can specify the further account assignment objects *internal orders* and *projects* in the dialog box *Book/Payment Info* for internal activity allocation purposes.
- In addition, you can specify a percentage value for cost distribution to multiple account assignment objects.
- The *Book/Payment Info* dialog box also has a function that lets you determine cost distribution.

Activities

For activity allocation of attendance fees:

- When you use the function *Book Attendance with Payment Info*, select the settlement type *Activity allocation* in the *Fee Assignment* dialog box and enter data as required for:
Cost center assignment and account assignment objects.
- Execute the report *Activity Allocation for Business Events (RHINLV00)* for the attendees concerned.

For activity allocation of instructor function:

- Execute the report *Activity Allocation for Instructor Function (RHINLV10)* for the instructor or the business event that reserved the instructor as a resource.

See also:

[Performing Activity Allocation for Attendance Fees \[Page 145\]](#)

[Performing Activity Allocation for Instructor Function \[Page 147\]](#)

For information on the interface, refer to:

[Activity Allocation in Training and Event Management \[Page 424\]](#)

[Activity Allocation in Training and Event Management: Attendance Fees \[Page 425\]](#)

[Activity Allocation in Training and Events: Instructor Function \[Page 432\]](#)

Performing Activity Allocation for Attendance Fees

Performing Activity Allocation for Attendance Fees

Use

This report lets you allocate costs incurred for attendance fees internally.

During activity allocation for attendance fees, the cost center of the business event cost object (sender cost center) is credited and the attendee's cost center (receiver cost center) is debited.

Prerequisites

- Attendance should not be free of charge.
- The attendee may not be on the waiting list.
- The attendee's *cost center assignment* must be maintained.
- The receiving cost center must be maintained.
- The sender cost center must be maintained.
- Sender and receiving cost center must be in the same controlling area.
- The activity type must be maintained.

Procedure I (from the dynamic Business Event menu)

1. Select the business event date for which you want to allocate attendance costs internally.
2. Choose *Business events* → *Activity allocation* → *Attendance*.
3. Proceed to step 10 of Procedure II.

Procedure II (from the SAP Standard Menu)

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Activity Allocation* → *Attendance*.
2. Specify whether you want to start the program with a *business event*, a *business event type*, or a *business event group* by selecting the relevant option.
3. In the *Object ID* field, enter the details according to your selection in step 2. You can enter a search string to find the ID. You can make a multiple selection if required.
4. Enter the *reporting period*.
5. Select either *All*, *Already allocated* or *Not yet allocated* attendees.
6. Select either *With cancellations*, *Without cancellations*, or *Only cancellations* for the list output.
7. If required, change the *document date* (output date of original document). The default date proposed by the system is the current date.
8. If required, change the Posting date. Default is the start date of the business event.



If you select the parameter *Selection screen*, you access a more detailed report selection screen for activity allocation. For instance, you can search for objects in a

Performing Activity Allocation for Attendance Fees

certain status (active, planned etc.). However, as a rule, it is not necessary to call this selection screen for activity allocation purposes.

9. Choose *Execute*.
10. A list screen appears displaying business events and attendees for activity allocation according to your specifications. You can download the list into Rich Text Format if required.

You have the option of changing the instructor's fee or the cost center assignment at this point using the function *Change account assignment*.

11. On the list screen, choose *Create activity allocation*. This triggers activity allocation, whereby allocation data is transferred to the Cost Accounting system.

The following display and checking functions are available from the list screen:

- Check activity allocation
- Display document flow
- Display document

12. To complete the activity allocation process, choose *Compare document (one/all)*.

Result (of Procedures I and II)

Attendance fees have been allocated.



In the event of errors in the allocation data transfer to CO, you can view the error log with the function *Display error log*.

Once you have corrected all errors, you can start the activity allocation again.

You can cancel a document for fees that have already been allocated with the function *Cancel document*.

See also:

[Internal Activity Allocation \[Page 143\]](#)

For information on the interface, refer to:

[Activity Allocation in Training and Events: Attendance Fees \[Page 425\]](#)

[Business Process Flow of Activity Allocation \[Page 428\]](#)

[Performing Activity Allocation: Attendance Fees \[Page 430\]](#)

[Checking Activity Allocation: Attendance Fees \[Page 431\]](#)

Performing Activity Allocation for Instructor Function

Performing Activity Allocation for Instructor Function

Use

This report lets you allocate costs incurred for instructor function internally. During activity allocation for instructor function, the cost center of the business event cost object (receiving cost center) is debited and the instructor's cost center (sender cost center) is credited.

Prerequisites

- Cost items must be maintained for the resource type 'Instructor'.
- Cost center assignment must be maintained for the instructor.
- The receiving cost center must be maintained.
- The sender cost center must be maintained.
- Sender and receiving cost center must be in the same controlling area.
- The activity type must be maintained.

Procedure I (from the dynamic Business Event menu)

4. Select the business event date for which you want to allocate instructor function costs internally.
5. Choose *Business events* → *Activity allocation* → *Instructor function*.
6. Proceed to step 9 of Procedure II.

Procedure II (from the SAP Standard Menu)

12. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Activity Allocation* → *Instructor Function*.
13. Specify whether you want to start the program with a *business event*, *event type* or *event group* by selecting the relevant option. Alternatively, select the object type to which the instructor is assigned (e.g. person). The system offers all object types for selection that are assigned to individual persons.
14. Enter the relevant object ID according to your selection above. You can enter a search string to find the ID.

You may also make a multiple selection and specify a number of instructors for allocation.
15. Enter the *reporting period*.
16. Specify whether the list output should contain *not yet allocated*, *already allocated* or *all instructors* of the event.

This entry is only required if you selected a *business event group*, *type*, or *event* in step 2.
17. If required, change the *document date* (output date of original document). The default date proposed by the system is the current date.
18. If required, change the Posting date. Default is the start date of the business event.

Performing Activity Allocation for Instructor Function



If you select the parameter *Selection screen*, you access a more detailed report selection screen for activity allocation. For instance, you can search for objects in a certain status (active, planned etc.). However, as a rule, it is not necessary to call this selection screen for activity allocation purposes.

19. Choose *Execute*.
20. A list screen appears displaying business events and instructors for activity allocation according to your specifications. You can download the list into Rich Text Format if required.
You have the option of changing the instructor's fee or the cost center assignment at this point using the function *Change account assignment*.
21. On the list screen, choose *Create activity allocation*. This triggers activity allocation, whereby allocation data is transferred to the Cost Accounting system.
The following display and checking functions are available from the list screen:
 - *Check activity allocation*
 - *Display document flow*
 - *Display document*
11. To complete the activity allocation process, choose *Compare document (one/all)*.

Result (of Procedures I and II)

Instructor fees have been allocated.



In the event of errors in the allocation data transfer to CO, you can view the error log with the function *Display error log*.

Once you have corrected all errors, you can start the activity allocation again.

You can cancel a document for fees that have already been allocated with the function *Cancel document*.

See also:

[Internal Activity Allocation \[Page 143\]](#)

For information on the interface, refer to:

[Activity Allocation in Training and Events: Instructor Function \[Page 432\]](#)

[Business Process Flow of Activity Allocation \[Page 435\]](#)

[Performing activity allocation for instructor functions \[Page 437\]](#)

[Checking Activity Allocation: Instructor Function \[Page 438\]](#)

Business Event Costs

Business Event Costs

Definition

Business event costs are made up of the cost items stored per business event type or business event, and per resource type or resource.

The cost items are valued either directly or using default values. They can be calculated on the basis of:

- A business event
- An attendee and/or
- A time unit.



You make the necessary configurations for cost items in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under [Define Cost Items \[Page 53\]](#).

Use

The costs calculated can be transferred to *Cost Accounting*, or adopted as a price proposal for the event.

Structure

Business event costs can include the following cost items:

- Business event type costs
 - Training materials
 - Marketing costs
- Resource type costs
 - Instructor costs
 - Rental for PCs
 - Electricity for room
 - Stationery
 - Rental for room equipment

Prerequisites

The cost items must be defined and valued for the business event or event type, and the resource or resource type in the *Costs* infotype (1036).

See also:

[Cost Transfer Posting in Cost Accounting \[Page 151\]](#)

[Price Proposal \[Page 156\]](#)

Cost Transfer Posting in Cost Accounting

Cost Transfer Posting in Cost Accounting

Use

The function RHCCOS00 lets you calculate the costs of business events and transfer these to *Cost Accounting* (CO). During this process, the cost center of the resource is credited, and the cost center of the business event cost object is debited.

See also:

[Business Event Costs \[Page 149\]](#)

Integration

You activate integration with *Cost Accounting* in Customizing for *Training and Event Management* under [Cost Transfer Posting \[Ext.\]](#).

Prerequisites

- The cost items for the business event or event type, and the resource or resource type must be maintained in the *Costs* infotype (1036) with the relevant reference unit and valid [cost element \[Ext.\]](#).
- The sender cost center must be maintained.
- The receiving cost center must be maintained.
- The sender and receiver's cost centers are in the same controlling area.
- The business events concerned must have the status *firmly booked* (active).

Features

Selection

You can set parameters to determine the data output by the report.

Objects or business event selection (pre-report)

There are a number of ways to start the report:

- a. Enter one or more *business event groups*. The system finds all of the business events belonging to the specified group(s) and calculates the costs.
- b. Enter one or more *business event types*. The system finds all of the business events belonging to the specified type(s) and calculates the costs.
- c. Enter one or more *business events*.

Reporting period

You can specify any period for which you want to determine costs.

Document date

Enter a date in this field if you want to change the default date of the cost transfer transaction. This date is used purely for information purposes. The default date is usually the current date.

Posting date

Cost Transfer Posting in Cost Accounting

The date in this field indicates when costs are to be posted to CO, in other words, the settlement period. The default date is usually the *business event start date*. You can overwrite this date as required.




You want to perform cost transfer posting for an event that started on February 2nd of a given year. However, you want costs posted in the second quarter rather than in the first quarter. In this case, you enter April 2nd as the posting date.


Currency

Enter the currency in which costs should be output and for cost transfer posting purposes.

Standard selection screen (only pre-report RHXCCOS0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHCCOS00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The system displays a list containing the following information per business event:

- The individual cost items
- The number of individual cost items
- The individual costs per cost item
- The origin of the costs (such as the resources for which costs were stored)
- The cost centers of the resources (account assignment object)
- The cost centers of the cost object (sender cost center)
- The cost element
- The reference unit (such as *time*)
- The overall costs

You can perform **cost transfer posting** from the *list screen*:

If you select *Transfer costs* and choose *Create cost transfer*, the costs of the selected business events are transferred to CO.

The following process flow takes place:

5. A validation check is performed on the document items. If the items are validated, a reference document is generated with the status *transfer designated*.
6. The BAPI/ALE for the cost transfer posting is called.
7. The status of the reference document is changed to *transfer effected* (yellow/amber light).

Cost Transfer Posting in Cost Accounting

8. Due to the fact that the systems may be decoupled (CO and PE in distributed systems), confirmation of this transaction is necessary to ensure that the transaction has actually been executed.

For this purpose, you must call the function *Compare document*. The system searches for the original CO document.



It is only possible to further edit attendee data, for example, to make a cancellation, when the cost transfer operation has been confirmed in the target system using the function *Compare document*.

If the original document is found, the status of the reference document changes to *Transfer confirmed* (green light). You can display the original document by choosing *View → Ref. <-> Original document*.

If the original document cannot be found, the status of the reference document changes to *Transfer incorrect* (red light).



For more information on the procedure when the original document cannot be found, refer to *Error diagnosis* in note 161511.

You can execute the following functions from the list screen:

- *Display the document flow* for the business event, in other words, all of the relevant allocation data that exists for the business event.
- *Display document (reference document)* You can also display the original document from here.
- *Display error log* (confirmations of check/execution of cost transfer posting)
- *Check whether data relevant for transfer can be posted*. This function also checks whether the settlement period is closed, in which case, data transfer to CO is not allowed.
- *Cancel document*: In the event of errors in the billing document, you can cancel (reverse) the document and start the billing procedure once again. This process is equivalent to generating a new document.
- *Display the resource list* of the business event
- *Display resources not yet assigned* to the business event, in other words, resources that have not yet been reserved for the event although they are listed under resource requirements.



If you are performing cost transfer posting in distributed systems (HR and CO in different systems), please note the information contained in [Set Cost Transfer Posting in Training and Event Management \[Ext.\]](#).

See also:

[Transferring Costs \[Page 155\]](#)

For information on the interface, refer to:

[Cost Transfer Posting in Training and Event Management \[Page 448\]](#)

[Business Process Flow of Cost Transfer Posting \[Page 451\]](#)


[Cost Transfer Posting \[Page 453\]](#)

[Checking Cost Transfer Posting \[Page 454\]](#)

Transferring Costs

Transferring Costs

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Cost Transfer Posting*.
2. Specify whether you want to start the report with a *business event*, a *business event type*, or a *business event group* by selecting the relevant option.
3. In the *Object ID* field, enter the details according to your selection in step 2. You can make a multiple selection if required.
4. Enter the *reporting period*.
5. If required, change the *document date* (output date of original document). The default date proposed by the system is the current date.
6. If required, change the Posting date. Default is the start date of the business event.
7. In the *Currency* field, specify the currency in which costs should be displayed.
8. Choose  to execute the report. The report output screen appears listing the costs to be transferred per business event.
9. Choose *Check document*. The system checks whether the settlement data is complete.



If data is missing, an error log is output. You can use this to add missing data. You cannot post costs until errors have been corrected.

10. Choose *Create cost transfer*. The *Training and Event Management* system transfers all settlement data to Cost Accounting, where cost transfer posting is performed for the business event costs. A reference document number is created in *Training and Event Management*.
11. Select the reference number of the cost transfer operation and choose *Compare document*. The system determines the status of the cost transfer.

If cost transfer posting was executed successfully in *Cost Accounting*, the document information is displayed.

In the event of errors, you can display the document flow and the error log. You can use the log to correct errors and start cost transfer posting again.

Result

You have successfully performed cost transfer posting or corrected existing errors to enable you to start the cost transfer report again.

See also:

[Cost Transfer Posting in Cost Accounting \[Page 151\]](#)

Price Proposal

Use

This function (report RHCPRI00) lets you instruct the system to calculate a price proposal for a business event based on the cost items stored for it, the reference units and reservation times.

The price proposed is the price for an individual attendee, enabling you to fix realistic prices that adequately cover your business event costs. You can adopt the proposed price as the business event price or use it as a guideline for your own calculations.

You can determine prices for one or multiple events at one go. The same applies to adopting the proposed price: you can process multiple events simultaneously.

Prerequisites

The cost items for the business event or business event type, and the resource or resource type must be maintained in the *Costs* infotype (1036) with the relevant reference unit.

Integration

The report RHCPRI00 has a pre-report RHXCPRI00 with a simplified selection screen.

Features

- The report calculates a price proposal based on the cost items stored for the event and either the optimum capacity or the actual number of attendees booked for the event. You adopt the proposed price for your business event by transferring it to infotype 1021.



When you transfer the proposed price, any other prices stored for both internal and external attendees are overwritten.

- You can also use this report to calculate price proposals for alternative event schedules and costs (subtypes of the infotypes *Time Schedule* and *Costs*).
- You can use the price proposal function when you create a business event type or an event date. You can also access the report on the *SAP Easy Access* screen under *Business Event* and in the *Dynamic Business Event Menu* under *Business Event*.

The following items are added together to determine a price proposal:

1. Cost items of the business event (E)
2. Cost items of the business event type (D) in relation to business event plus
3. Cost items of resources (G) reserved for the business event:
4. Cost items of resource types (R) related with the event type plus:
5. Cost items of the equipment (R) contained in the room reserved for the event

If the same cost items are maintained for both the event and the event type, the values stored for the event itself are taken. The same applies to cost items stored for resource types and resources. The values stored for the actual resources are taken.

Price Proposal

Selection

You can set parameters to determine the data output by the report.

- Objects

There are a number of ways to start the report:

 - a. Enter one or more *business event groups*. The system finds all of the business events belonging to the specified group(s) and calculates a price proposal.
 - b. Enter one or more *business event types*. The system finds all of the business events belonging to the specified type(s) and calculates a price proposal.
 - c. Enter one or more *business events* for which the system calculates a price proposal.
- Reporting period

You can specify any period for which you want to determine a price proposal. The report only includes business events whose start date lies within the selection period.
- Business event schedule

You can specify a subtype of the *Schedule* infotype (1035) stored for the business events to be used as the time unit in the calculation. Subtype 0001 is the default setting.
- Subtype of costs

You can specify a subtype of the *Costs* infotype (1036) if you want to have the cost items stored there used as the basis for the price proposal. Subtype 0001 is the default setting.
- Status of costs

You can specify a status for the *Costs* infotype. In this way, you can prevent the report from including data that is in planned status for example. This field is empty (SPACE) by default which means that the report includes both active and planned costs in the calculation by default.
- Currency

You must specify the currency in which you want the price proposal determined.
- Basis: Optimum capacity

You can select this parameter to specify that the report should always use the optimum capacity determined for the business event as the calculation basis. (This is the business event capacity taking the room capacity into account.) For information regarding capacity determination, see also [Capacity \(Infotype 1024\) \[Page 355\]](#).

If you do not select this parameter, the calculation basis depends on the planning status of the business event as follows:

If a business event is in *planned* status, the optimum capacity is taken (under consideration of the resource capacity). If a business event is in *firmly booked* status, the actual number of attendees booked is used for price determination.

Output

The system displays a list containing the following information per business event:

- The individual cost items
- The origin of the individual cost items (e.g. resource)

- The status of the individual cost items
- The price of the individual cost items
- The reference unit (such as *time*)
- The sum total of business event costs (proposed price) and the calculation basis used (such as the optimum capacity of the business event)
- The individual amount of business event costs per attendee

You can execute the following functions from the **list screen**:

- Transfer the proposed price as the business event price. To do so, you must select the indicator *Propose as business event price* and choose *Execute price proposal*. When you do so, the price is transferred to the *Prices* infotype (1021) appended to the business event.
- Transfer the proposed price to all business events in the report with the function *Select all*.
- Display the resource list of the business event.
- Display the *resources not yet assigned*, in other words, resources that have not yet been reserved and are still required for the event.

Example

The following cost items are relevant for a five-day business event with the optimum number of attendees 10 (the calculation basis for the price proposal):

For the business event itself:

- 10 DM Manuals (per attendee)

For the corresponding business event type:

- 15 DM Manuals (per attendee)
- 20 DM Catering (per attendee)

Reserved resources

- 200 DM Room (per day)

Resource types

- 150 DM Room (per day)

The price proposal results from adding the following items:

- 100,- Manuals (Origin: Business event)
- 200,- Catering (Origin: Business event type)
- 1000,- Room (Origin: Business event)

The sum total of 1300 DM is divided by ten (the optimum capacity) resulting in a price proposal of 130 DM per attendee. If you select the option *Propose as business event price* and choose *Execute price proposal*, the price of 130 DM is written to infotype 1021 as internal and external price of the business event.



See also:

[Determining a Price Proposal \[Page 160\]](#)

Price Proposal

Calculating a Price Proposal

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Price Proposal*. The *Calculate Business Event Prices and Transfer to Prices Infotype (1021)* screen appears:
2. Specify whether you want to start the report with a *business event*, a *business event type*, or a *business event group* by selecting the relevant option.
3. In the *Object ID* field, enter the details according to your selection in step 2. You can make a multiple selection if required.
4. Enter the *reporting period*.
5. In the *Currency* field, specify the currency in which prices should be displayed.
6. Choose . The output screen *Determine Business Event Costs and Propose as Price* appears. If you want to adopt the proposed price and transfer it to infotype 1021 for the business event, proceed as described from step 7.
7. Select the option *Propose as business event price*.
8. Choose  *Price proposal*.

Result

You have determined a price proposal and, if you carried out steps 7 and 8 adopted it as the price for your business event in the *Prices* infotype.

See also:

[Price Proposal \[Page 156\]](#)

Budgeting

Budgeting

Use

This function lets you create training budgets for organizational units in *Training and Event Management*, and compare these budgets with the actual costs accrued for attendance fees and cancellation fees. This comparison takes into account the fees for all individual bookings and group bookings for your selected organizational units.

Prerequisites

You use the *Organizational Management* application component integrated with *Training and Event Management*. In other words, you run both components in the same plan version and have set up an organizational structure.

You have maintained the relevant settings in Customizing for *Training and Event Management* under *Integration* → *Budget Management*.

Features

- On the initial budgeting screen, you have access to all of the budgeting functions in *Training and Event Management* (such as *create budget structure*, and *compare budget*).
- You can create budget structures that contain one or multiple budgets (= budget units, object type BU). By creating relationships between budget objects, you develop a hierarchical structure with super- and subordinated budgets, similar to the organizational structure.
- You can generate budget structures from organizational structures.
- You can assign budget units to individual organizational units and delete these assignments again where necessary.
- You can display the budget structure together with budget values and status information.
- Once you have created a budget structure, you can store amounts (budget values) for the individual budgets.
- You can *revalue* budgets, that is, change the amount.
- You can *roll up* budgets, that is, accumulate budget amounts bottom up.
- You can *delete* budgets, that is, delete a budget and its relationship to an organizational unit.
- You can check budgets, that is, check to ensure that your budget is consistent and that the superior budget amount is sufficient to cover subordinate budgets. If necessary, you can correct errors using the error log.
- You can *copy* budgets, that is, copy an existing budget for use with another budget type or another period.
- You can *carry forward* a budget structure that has *released* status to another budget period.
- You can *compare* budgets, that is, compare the training and education costs incurred by an organizational unit with the budget amounts assigned to the unit.

Activities

1. You create a *budget structure* for the budget type that you created in Customizing for *Training and Event Management* to cover training and education costs in organizational units. For this purpose, you create individual budget units and their relationships in a hierarchy. Or alternatively, you generate a budget structure from an existing organizational structure.
2. You assign organizational units to the budget units.
3. You start your budget planning by specifying *budget values* for the individual budget units.
4. You use the function *Change budget (revalue)* to make any changes to the amounts (by entering either an absolute amount, a percentage, or both).
5. You perform a *consistency check* on your budget planning. The system checks to ensure that the budget amount assigned to the superior budget unit is sufficient to cover the subordinate budget units. If there are deficits, the system creates an error log. You can use the error log to correct the figures directly.
6. You carry out a *budget comparison*. The system determines the amounts of the training budget currently available by subtracting the attendance fees and, where relevant, cancellation fees accrued in the organizational unit to date from the training budget assigned to it. The original budget is offset against the current budget value.

See also:

[Creating a Budget Structure \[Page 163\]](#)

[Generating a Budget Structure \[Page 164\]](#)

[Displaying a Budget Structure \[Page 165\]](#)

[Changing a Budget Structure \[Page 166\]](#)

[Creating Subordinate Budget Units \[Page 168\]](#)

[Deleting a Budget Structure \[Page 169\]](#)

[Assigning a Financing Unit \[Page 170\]](#)

[Overwriting Budget Values \[Page 171\]](#)

[Changing Budget Values \(Revaluing\) \[Page 172\]](#)

[Copying a Budget Structure \[Page 174\]](#)

[Checking a Budget Structure \[Page 175\]](#)

[Releasing a Budget Structure \[Page 176\]](#)

[Carrying Forward a Budget Structure \[Page 177\]](#)

[Carrying out a Budget Comparison \[Page 178\]](#)


Creating a Budget Structure

Creating a Budget Structure

Use

This function lets you create a budget structure by creating the root budget unit.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial Screen* appears.
2. Choose . The *Create Budget Structure: Initial Screen* appears.
3. Select the *budget type* that you want to use to store training budgets.
4. Select the *budget period*.
5. Enter a short and long name for the *budget unit*.
6. Choose *Budget distribution* or *Financing*.



The *budget distribution* option lets you assign other budget units to the new budget unit, and store budget values for the individual units. The *financing* option lets you assign additional organizational units to the budget units of the budget structure.

7. Choose . The *Change Budget Structure* screen appears.

Result

The system has created the budget structure with one budget unit in *planned* status. You can now add further subordinate budget units to the budget structure, assign financing objects (organizational units) to the budget units, and store budget values.

See also:

[Budgeting \[Page 161\]](#)

[Creating Subordinate Budget Units \[Page 168\]](#)

[Assigning a Financing Unit \[Page 170\]](#)



[Overwriting Budget Values \[Page 171\]](#)

Generating a Budget Structure

Use

This function lets you generate a budget structure automatically from an existing organizational structure.

Procedure

8. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
9. Choose . The *Generate Budget Structure* screen appears.
10. Enter the name of the *organizational unit* you want to copy.
11. Select the *budget type* and the *budget period* for which you want to create a budget structure.
12. Select *Generate financing relationships* if you want to link the budget units to the corresponding organizational units (and any underlying budget units and organizational units) as well.
13. Select *Use relationship period of organizational unit* if you want the system to use the relationship period between the root organizational unit and the underlying organizational unit. If you want the system to use the period when both the organizational unit and the budget unit exist, do not select this option.
14. Choose . The *Change Budget Structure* screen appears.

Result

The budget structure has been generated from the selected organizational structure.

See also:



[Budgeting \[Page 161\]](#)

[Changing a Budget Structure \[Page 166\]](#)

Displaying a Budget Structure

Displaying a Budget Structure

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
2. Choose . The *Display Budget Structure: Initial* screen appears:
3. Select the *budget period* for which you want to see a budget structure.
4. Select a *budget unit*.
5. Set one of the display options as required:
 - a. *Budget distribution*: Display of the budgets and amounts.
 - b. *Financing*: Display of the budgets and the objects financed (organizational units).
6. Choose .

Result

The selected budget unit and all underlying budget units are displayed in a tree structure.

See also:

[Budgeting \[Page 161\]](#)

Changing a Budget Structure

Use

With this function you can do the following:



- Change budget structures, that is, create new subordinate budget units, assign existing budget units, delete assignments, and delete budget units.
- Create and delete relationships between budgets and financing objects (organizational units)
- Edit budget values, overwrite values or revalue budgets









Prerequisites

A budget structure (budget unit) must exist.

If you want to assign budget units to financing objects (organizational units), you must select the *Financing* option under *Display options* on the *Change Budget Structure Initial Screen*.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
2. Choose . The *Change Budget Structure: Initial* screen appears:
3. Select the *budget unit* you want to change.
4. Select the option *Financing* under *Display options*. This gives you access to all editing features.
5. Choose . The *Change Budget Structure* screen appears.
6. Change data as required using the following functions:

	Create Subordinate Budget Units [Page 168]
	Delete a Budget Unit [Page 169]
 <i>Budget</i>	Assign existing budget unit
 <i>Budget</i>	Delete assignment to budget unit
 <i>Financing:</i>	Assign a Financing Object [Page 170]
 <i>Financing:</i>	Delete assignment to financing object
	Overwrite Budget Values [Page 171]
	Change Budget Values (Revalue) [Page 172]

Result

You have made the required changes to the budget structure.

See also:

[Budgeting \[Page 161\]](#)

Changing a Budget Structure

Creating Subordinate Budget Units





Use

This function lets you create a subordinate budget unit for an existing budget unit, together with the relevant relationship.

Prerequisites

You have already created a budget unit to which you can assign subordinate budget units.

Procedure

15. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
16. Choose . The *Change Budget Structure: Initial* screen appears:
17. Select the *budget unit* to which you want to assign a budget unit.
18. Choose . The *Change Budget Structure* screen appears.
19. Select the budget unit for which you want to create a new (subordinate) budget.
20. Choose . The *Create Budget and Relate* dialog box appears.
21. Enter an *abbreviation* and a *long name* for the new budget.
22. Choose .

Result

You have created the budget and related it to the required budget unit. You can now change this budget, for instance, you can overwrite a budget value for it, or assign a financing unit (organizational unit) to it.

See also:

[Budgeting \[Page 161\]](#)

[Assigning a Financing Unit \[Page 170\]](#)

[Overwriting Budget Values \[Page 171\]](#)




Deleting a Budget Structure

Deleting a Budget Structure

Use

This function lets you delete budget structures and all subordinate budget units. You can also delete budget structures partially.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
2. Choose . The *Change Budget Structure: Initial* screen appears:
3. Select the *budget unit* you want to delete or the budget structure to which the unit belongs.
4. Choose . The *Change Budget Structure* screen appears.
5. Select the budget unit you want to delete.
6. Choose .

Result

You have deleted the budget unit and all subordinate budget units..

See also:

[Budgeting \[Page 161\]](#)

[Changing a Budget Structure \[Page 166\]](#)

Assigning a Financing Unit





Use

This function lets you assign financing units (organizational units) to the individual budget units.

Prerequisites

The budget units and organizational units must exist.


Procedure

23. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
24. Choose . The *Change Budget Structure: Initial* screen appears:
25. Select the budget unit for which you want to create a budget.
26. Select the option *Financing* under *Display options*.
27. Choose . The *Change Budget Structure* screen appears.
28. Select the budget to which you want to assign an organizational unit.
29. Choose  *Financing*. The *Choose Organizational Unit* dialog box appears.
30. Select an organizational unit and choose .

Result

The organizational unit has been assigned and is displayed below the budget unit.



You can delete the assignment between the budget unit and the organizational unit again by choosing  *Financing*.

See also:

[Budgeting \[Page 161\]](#)

[Changing a Budget Structure \[Page 166\]](#)





Overwriting a Budget Value

Overwriting a Budget Value

Use

This function lets you enter the actual amounts for budgets.

Procedure

7. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
8. Choose . The *Change Budget Structure: Initial* screen appears:
9. Select the *budget unit* whose value you want to overwrite.
10. Choose . The *Change Budget Structure* screen appears.
11. Select the budget value you require.
12. Choose . The *Overwrite Budget Value* dialog box appears.
13. Enter a new *budget amount*.
14. Choose .

Result

You have overwritten the budget value.



Under *Edit* → *Budget value* → *Roll up*, you can store budget values for subordinate budgets and then let the system calculate the budget values required for the superior budgets.

See also:

[Budgeting \[Page 161\]](#)




[Changing a Budget Structure \[Page 166\]](#)

Changing Budget Values (Revaluing)

Use

This function lets you increase or decrease a budget value by an absolute amount, a percentage, or by both.

Procedure

31. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
32. Choose . The *Create Budget Structure: Initial* screen appears:
33. Under *Budget unit*, select a budget unit.
34. Choose . The *Change Budget Structure* screen appears.
35. Select the budget value you require.
36. Choose . The *Revalue Budget* dialog box appears.
37. In the *Change by percentage* field, enter the percentage by which budget value should change, and under *Change by amount*, enter the amount by which budget value should change.

Example:

If you want to change the amount:	Then enter:	Sample entry:
By a percentage:	A percentage in the <i>Change by %</i> field.	5
By an amount:	An amount in the <i>Change by amount</i> field.	-500,00
By a percentage and an amount:	A percentage and an amount in the respective fields.	6,5 300,00



If you decrease the budget value, you must enter a minus (-) sign before the amount or percentage e.g. -500 , 00.

If you want to increase or decrease a budget by an absolute amount and a percentage, you can enter both a percentage and an amount in the relevant fields in the *Revalue Budget* dialog box. In this instance, the system first increases or decreases the budget by the specified percentage. It then adds or subtracts the absolute amount.

5. Choose .

Result

You have changed the budget amount.

Changing Budget Values (Revaluating)

See also:

[Budgeting \[Page 161\]](#)

[Changing a Budget Structure \[Page 166\]](#)

Copying a Budget Structure

Use

You can use this function to copy a budget from one budget period to another and from one budget type to another.



The advantage of using the copy function is that you do not have to create the structure every time you want to create a budget structure, be it for a different period or a different budget type. You can simply copy an existing budget structure and then use the change function to modify it.

This function has the following copy options:

- Copy budget structure depth
- Copy budget amounts
- Copy financing relationships (relationships with organizational units)

These options allow you to choose whether you want to copy just the budget structures and their amounts, or the budgets and the objects they finance. The option of specifying a structural depth lets you define exactly how much of the budget structure you want to copy.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial screen* appears:
2. Choose . The *Copy Budget Structure* screen appears.
3. Enter the *budget type*, the *budget period* and the *name* of the budget structure you want to copy.
4. Under *Copy*, select a budget type if it differs from the original, and a *budget period* for the copied budget.
5. Select one or more copy options (see above under *Use*). Under *Budget struc. depth*, enter a number indicating the depth (from top down) to which you want the structure copied.
6. Choose . The *Change Budget Structure* screen appears.

Result

You have copied the budget structure and all subordinate budget units to the specified level.

See also:

[Budgeting \[Page 161\]](#)

[Changing a Budget Structure \[Page 166\]](#)

Checking a Budget Structure




Checking a Budget Structure

Use

This function lets you check that your budget structure is consistent. The system checks to ensure that the budget amount assigned to the superior budget unit is sufficient to cover the subordinate budget units.

If deficits exist, it outputs an error log that you can use to rectify the errors directly. Once errors have been corrected, you can release the budget.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
2. Choose . The *Display Budget Structure: Initial* screen appears:
3. Select the *budget period* for which you want to check a budget structure.
4. Select the *budget unit* you want to check.
5. Choose . The *Display Budget Structure* screen appears.
6. Select the *budget unit* to be checked.
7. Choose *Budget structure* → *Check*. If there are no deficits found, a message to this effect is output. Proceed to *Result*.
8. If a root budget unit does not have sufficient funds to cover the subordinate budget units, the *Budget Check – Error Log* dialog box appears.
9. Select an error in the log and choose . The *Revalue Budget* dialog box appears.
10. Enter a *percentage* or an absolute *amount* to offset the deficit.
11. Use the same procedure to correct all of the errors.

Result

The budget structure is consistent and can be released.

See also:

[Budgeting \[Page 161\]](#)

Releasing a Budget Structure



Prerequisites

You have already checked the consistency of the budget structure and corrected any errors.

See also:

[Checking a Budget Structure \[Page 175\]](#)

Procedure

15. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
16. Choose . The *Change Budget Structure: Initial* screen appears:
17. Select the *budget unit* you want to release.
18. Choose . The *Change Budget Structure* screen appears.
19. Choose *Budget structure* → *Set status* → *Release*.

Result

The budget is now in status **1** (*active*).

See also:

[Budgeting \[Page 161\]](#)

Carrying Forward a Budget Structure

Carrying Forward a Budget Structure

Use

This function lets you carry forward a budget structure that has been released.





You created a budget structure for salary increases for the budget period 1999, and you want to use this budget structure for the budget period 2000. Instead of creating a new budget structure, you can simply carry forward the existing budget structure.

Prerequisites

The budget structure must exist and have *released* status.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Budgeting*. The *Budgeting: Initial* screen appears:
2. Choose  *Carry forward*. The *Extend Budget Structure's Validity* screen appears.
3. Enter the *budget type* and the *name* of the budget structure you want to carry forward.
4. Enter the new *budget period* under *Carry-forward period*.
5. If required, under *Options* specify whether you want to copy a specific *budget struc. depth*, *budget amounts/quantities*, and/or *Financing relationships*.
6. Choose  *Carry forward*. The *Change Budget Structure* screen appears.

Result

You have extended the validity of the budget structure.

See also:

[Budgeting \[Page 161\]](#)

[Changing a Budget Structure \[Page 166\]](#)

Carrying Out a Budget Comparison

Use

This report (RHBUDG00) lets you compare the budget allocated to an organizational unit with the actual training and education costs accrued up to a certain key date in *Training and Event Management*.

The reporting period covers the current fiscal year up to the key date you specify.




Only budgets with the status *released* are included in the reporting.


Procedure


1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Budget* → *Comparison*. The *Budget comparison* screen appears.



Alternatively, you can call the budget comparison report from the initial budgeting screen by choosing  *Compare*.

2. Enter the organizational unit for which you want to carry out a budget comparison. If necessary, enter a *search string*.

To carry out the budget comparison for more than one organizational unit, choose  and enter the other organizational units in the multiple selection box.

3. Enter the *key date* for which you want to perform the budget comparison. The default date proposed by the system is the current date.
4. Select *incl. organizational structure* to include the organizational structure for the organizational unit, with any underlying organizational units, budgets and training costs in the list output by the report.
5. To include cancellation fees in the budget comparison, select the *Take cancellations into account* indicator.
6. Choose .

Result

The budget value and the actual value for each organizational unit are displayed in the predefined currency, from the first day of the current fiscal year up to the key date you specified.

See also:

[Budgeting \[Page 161\]](#)

Day-To-Day Activities

Day-To-Day Activities

Purpose

Day-To-Day Activities in *Training and Event Management* include the tasks and activities that are related to bookings, such as:

- [Book Attendance \[Page 190\]](#)
- [Attendance Cancellation \[Page 208\]](#)
- [Attendance Rebooking \[Page 206\]](#)
- [Replace Attendance \[Page 211\]](#)
- [Prebook Attendance \[Page 199\]](#)

These activities are supplemented by the [Correspondence \[Page 215\]](#) functions.

Prerequisites

You must first create a business event catalog containing details of the business event dates for which bookings can be made.

In Customizing for *Training and Event Management*, you must make the necessary settings so that attendees, instructors, and interested parties receive the relevant notifications. You make the settings under *Day-to-day Activities* → *Correspondence*.

You must create attendees in the system to be able to book them for business events.

See also:

[Creating an Attendee \[Page 183\]](#)

Process Flow

You can book attendees for events, make prebookings for an event type, rebook attendees for other events, replace attendees with others, and cancel bookings.

If you have set document output to automatic, the persons concerned automatically receive notification of these activities.

The *Correspondence History* function keeps you informed of what notifications have been sent to whom.

Attendee Types

Definition

Classification of attendees that can be booked for business events.

Structure

There are 9 attendee types available in *Training and Event Management*.

- **Individual attendees**
 - Person (employee of your company)
 - User (from the user master record)
 - [External person \[Page 181\]](#) (employee of another company)
 - Applicant (external person applying for a job to the company)
 - Contact person (employee of a business partner)
- **Group attendees**
 - [Company \[Page 182\]](#)
 - Organizational unit (organizational entity such as department or project group)
 - Customer (business partner)
 - Interested party (not to be used for billing and activity allocation)

See also:

[Checks for Individual Attendees \[Page 187\]](#)

[Checks for Group Attendees \[Page 189\]](#)

[Creating an Attendee \[Page 183\]](#)

External Person

External Person

Definition

Attendee or instructor of business events that belongs to an external organization (e.g. company) and whose data is not stored in the attendee or instructor pool (HR master data, applicant master data, or user master data).

Use

The Business Object Type *External Person* is an attendee type to which you can assign individual attendees and instructors in *Training and Event Management*.

You store data that is required for correspondence with instructors and attendees for the object *External Person*. *External Persons* can also be assigned to companies. In this case, you are not required to store address data specifically for the external person since the address data of the company is taken.

Structure

An *external person* is identified by:

- Plan version
- ID

The most important data you store for *external persons* includes:

- Name
- Name format (such as form of address, language and country assignment)
- Address
- Mail address

See also:

[Attendee Types \[Page 180\]](#)

Company

Definition

External organization that does not belong to the customer master record. Can be an event organizer or attendee in Training and Event Management.

Use

The Business Object Type *Company* is designed especially for stand-alone implementation of the *Training and Event Management* component, since there is no customer master record available for this object type.

The object *Company* can be used as an external organizer. Companies can also be booked as group attendees for business events.

External instructors and external attendees can also be assigned to companies. This enables you to store the necessary address data for instructors and attendees for correspondence purposes.

Structure

A company is identified by:

- a plan version
- ID

The most important data you store for companies includes:

- Abbreviation/name
- Address
- Mail address

See also:

[Attendee Types \[Page 180\]](#)

Creating an Attendee

Creating an Attendee

Use

In this step, you create attendee data in the system. In *Training and Event Management*, attendees are assigned to attendee types. This assignment also determines the kind of data that is maintained for the attendee.



You only maintain address data for attendees of the type *external person*.



For an attendee of the type *person* (internal employee), you must maintain all of the data recorded in *Personnel Administration* (PAPA) when a person is hired, such as cost center assignment.

The attendee's data must be stored in the system before you can book the attendee for a business event.

Prerequisites

You must first define what object types you want to use as attendee types in Customizing for *Training and Event Management* under [Specify Attendee Type Control \[Ext.\]](#).

Procedure

5. On the SAP Easy Access screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Settings* → *Current Settings* → *Attendee* → *Create*. A dialog box appears displaying the attendee types you use. Select the attendee type to which you want to assign the new attendee.
6. Choose . You access directly the initial screen or data screen of the attendee type you selected.
7. Enter attendee data as required.
8. Choose .

Result

You have created an attendee that you can book for business events.






See also:

[Attendee Types \[Page 180\]](#)




[Displaying/Changing Attendee Data \[Page 184\]](#)

Displaying/Changing Attendee Data

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Settings* → *Current Settings* → *Attendee* → *Change/Display*. . A dialog box appears displaying all attendee types for selection.
2. Select the attendee type of the attendee whose data you want to display or change and choose . The relevant *data screen* or *initial screen* appears.
3. Enter the attendee. Select the editing mode you require:
 - : the attendee's data screen is displayed with the infotypes that have been maintained.
 - : The *Maintain Object* data screen is displayed with the infotypes that have been maintained.
 - 
 -  is displayed beside infotypes that have already been stored for the attendee.

There are two *change* options:

 - You can change an existing infotype. To do so, select the infotype and choose .
 - You can create a new infotype for the object. To do so, select the infotype and choose . The infotype data screen appears where you can enter data as required.
4. Choose  to save your entries where relevant.

Result

You have displayed or changed attendee data.

Booking Priorities

Booking Priorities

Use

The booking priority indicates the status of a booking. There are three different booking priorities:

- Waiting-list booking
- Normal booking
- Essential booking



Priority intervals are two-digit values. You set the priority intervals in Customizing for *Training and Event Management* under *Day-to-Day Activities* → *Booking* → *Booking Priorities* via the switches SEMIN MAXMU and SEMIN MINWL. You also set the default priority displayed on the initial booking screen in this step via the switch SEMIN NPRIO.

Description of booking priorities

- **Waiting list**

A waiting-list booking is not, strictly speaking, a real booking. An attendee who wants to attend a business event that is fully booked can be put on the waiting list.

If places become available on the business event as a result of cancellations or rebookings, waiting-list candidates can be moved up. You define the move-up procedure in Customizing.

You make the required settings for the move-up procedure in Customizing for *Training and Event Management* under *Day-to-Day Activities* → *Canceling* → *Control data* in the SEMIN TOPMD entry.

- **Normal booking**

A normal booking, on the other hand, is a real booking. A normal booking means that attendance at a business event is assured unless the attendee has to be moved down to the waiting list when the business event is *firmly booked*.



An internal employee has a place on the business event while a customer has only a waiting-list booking. In a situation like this, the employee could be moved down to the waiting list and the customer moved up to the attendee list when the status of the event is changed to *firmly booked*.

Bookings with *normal* priority may only be made until the optimum capacity defined for the business event is reached.

- **Essential booking**

A booking that is assigned *essential* priority is a booking with attendance assured. Unlike a booking with *normal* priority, an attendee with an essential booking cannot be put back on the waiting list when the business event is firmly booked.

Booking Priorities

Once the optimum number of attendees has been reached, only bookings with essential booking priority are accepted until maximum capacity is reached. Once maximum capacity has been reached, only waiting list bookings are possible.

Checks for Individual Attendees

Checks for Individual Attendees

Features

When you book individual attendees for a business event, the system carries out the following checks:

- **Existence**

The system checks whether the attendee exists in the business event period. If, for example, the validity start date of a contract of employment is after the business event start date, you cannot make the booking.
- **Lock**

The system checks whether another user is currently editing the attendee or the business event. In this case, a message to this effect is output.
- **Availability**

The system checks whether an attendee is booked to hold a business event as instructor in this period. If so, attendance cannot be booked.

The system checks whether there is a conflicting booking for another business event in the same time period.
- **Capacity (for normal and essential bookings)**

The system checks whether optimum capacity has been reached. If it has, only essential bookings up to maximum capacity are allowed.

The system checks whether maximum capacity has been reached. If it has, only essential bookings with displacement are allowed.

See also:

[Booking Priorities \[Page 185\]](#)
- The system checks whether an attendee is already booked for the same business event.

If there is already an essential or a normal booking for an attendee on the same business event, the capacity checks are omitted. The original booking is overwritten.
- **Attendances/absences**

If you are working with integration with *Time Management*, the system reads the employee's personal shift schedule and attendance records to check whether the person is available in the business event period.

You define how the system should react in Customizing for *Training and Event Management* under [Define Incompatible Attendances/Absences \[Ext.\]](#).
- **Attendance Prerequisites**

A check can be carried out to see whether the attendee has the required knowledge and qualifications attained by attendance at other prerequisite business events. This check is optional.
- Bookings or prebookings for business events of the same type. This check is optional.

Checks for Individual Attendees

A check can be carried out to see whether the attendee is already booked for or has already attended a business event of the same type. This check is optional.

A check can be carried out to see whether the attendee is already prebooked on a business event of the same type. This check is optional.

- Check attendee's qualification

A check can be carried out to see whether the attendee has the necessary qualifications or alternative qualifications to attend the business event. This check is optional.

You make the necessary settings to control the system reactions for these three optional checks in Customizing for *Training and Event Management* under [Attendee Checks \[Ext.\]](#).

See also:

[Checks for Group Attendees \[Page 189\]](#)

[Booking Attendance \[Ext.\]](#)



Checks for Group Attendees

Checks for Group Attendees

When you want to book attendance for a company, organizational unit or other group attendee, you can either simply enter the required number of attendees as a no-name booking (N.N. booking) or display the list of attendees in the group and select the attendees you want to book.

Features

The following checks are carried out when you make a group booking:

- Existence
The system checks whether the attendee exists in the business event period. If this is not the case, you cannot make the booking.
- Lock
The system checks whether another user is currently editing the attendee or the business event. In this case, a message to this effect is output.
- Capacity (for normal and essential bookings)
The system checks whether optimum capacity has been reached. If it has, only essential bookings up to maximum capacity are allowed.
The system checks whether maximum capacity has been reached. If it has, only essential bookings with displacement are allowed.

When you book group attendees, you can split the group if necessary. You might do this, for example, if there are only four free places for a group of six attendees. You can book four attendees and make waiting-list bookings for the remaining two.
- The system checks whether an attendee is already booked for the same business event.

If a group attendee already has a booking for the same business event for the same date with the same priority, the number of attendees is increased accordingly.

See also:

[Checks for Individual Attendees \[Page 187\]](#)

[Booking Attendance \[Ext.\]](#)

Book Attendance

Use

This function lets you enroll attendees for business events and, at the same time, store the relevant billing and activity allocation data (settlement type, fees, and so on).

Prerequisites

For *billing*:

- Integration between *Training and Event Management* and *Sales and Distribution* must be active and all of the settings relevant for billing should have been maintained.
- The attendee's *address* must be available.
- The *customer master record* must be in the sales area of the business event. If not, then you should have created a *one-time customer* and stored address data for the attendee there.

For *internal activity allocation*:

- Integration between *Training and Event Management* and *Cost Accounting* must be active and all of the settings relevant for activity allocation should have been maintained.
- The attendee's *cost center assignment* must be maintained.
- *Receiver* and *sender cost centers* must be maintained and must be in the same *controlling area*.
- The *activity type* for event attendance must be maintained.

Features

- You can make bookings for planned and firmly booked events, both internal and external. You cannot make bookings for business events that are canceled, locked, or that have a historical record flag.
- You can make single bookings for individual attendees (person, user, external person, applicant, or contact person) and group bookings for group attendees (company, organizational unit, customer or interested party).
- You can make list bookings. With the list booking function, you can book multiple attendees simultaneously for one event, or one attendee for a number of different events at one go.
- You can create attendees or additional attendee data when booking.
- When you book attendees, you enter all of the relevant billing and activity allocation data that is later required for settling attendance fees.
- You have the option of automatically transferring the settlement data stored for the corresponding attendee type to which the attendee belongs.



In this case, the billing and allocation data, such as cost center assignment, that is stored for the attendee type (in Customizing for *Training and Event Management* under [Specify Attendee Type Control \[Ext.\]](#)) is transferred to the attendee you are booking.

Book Attendance

- Alternatively, you can change the specifications made for the attendee type or make additional specifications and create notes for a given attendee. You do so in the dialog box that appears when you choose *Book/Payment Info*.



If you want to settle attendance fees by credit card, specify different partner functions for billing, or distribute costs to multiple account assignment objects in activity allocation, you must choose *Book/Payment Info* since this function offers you a dialog box in which to enter this data.

- Any waiting-list bookings for firmly booked events of this type are canceled.
- Any prebookings of an attendee for the business event type are deleted.
- The number of business event attendees is automatically updated.
- Bookings are automatically assigned the same status as the business event for which they are made.
- If integration with *Time Management* is active, the relevant attendance records in *Time Management* are updated when the attendee type *Person* is booked.

Activities

- You select a business event by entering a time period and a business event type or alternatively, in the *dynamic attendance menu* by selecting the required business event.
- You enter the attendee you want to book. You can create attendees that do not already exist in the system or change attendee data when you execute the *Book* function.
- You specify the booking priority. The booking priority specifies whether an attendee gets a place on the attendee list or not. When a booking is made, the system carries out a capacity check to see how many attendees may be booked for the business event. The following restrictions apply:
 - Once optimum capacity has been reached, only bookings with essential priority are possible.
 - Once maximum capacity has been reached, only bookings on the waiting list are possible.

See also: [Booking Priorities \[Page 185\]](#)

- You choose *Book/Payment Info* and, in the *Fee and Assignment* dialog box, enter the relevant settlement data and, where relevant create notes for the transaction. Alternatively, you simply choose *Book*.
- Attendee checks are performed. The system checks whether the attendee is available in the business event period. This check is carried out for all attendee types. Further specific checks are carried out for individual and group bookings, such as checks to ensure that an attendee is not booked for another event at the same time. Depending on the result of the check, the following occurs:
 - The attendee is automatically booked for the event.
 - You can book the attendee even if an information message or a warning message is displayed.
 - You cannot book the attendee if an error message is displayed.

See also:

[Booking Attendance \[Page 193\]](#)

[Booking Multiple Attendees for a Business Event \[Page 196\]](#)

[Booking an Attendee for Multiple Business Events \[Page 198\]](#)

Booking Attendance

Booking Attendance

Procedure


1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Human Resources* → *Training and Events* → *Attendance* → *Book: Attendee for Business Event*. The *Book Attendance: Data* Screen appears.
2. In the *Business event type* field, enter the required business event type. In the *search area* (top left) select the search tool or search variant you want to use to search for the event type, and where relevant enter the required data (such as a search term).
3. In the *selection area* (lower left), select the business event type you require from the hit list found and double-click it. The business event type is automatically transferred to the *work area* (right screen) under *Business event type*.




Alternatively, you can select the business event type directly using the possible entries help in the *work area* (right screen).

If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. The *Book Attendance: Data* dialog box appears, in which the event date is already selected. In other words, steps 1 to 7 are not required.

The dialog box corresponds to the work area that is displayed when you call the individual transaction in the *User Menu* or the *Easy Access Menu*. For more information on the display features in the individual transactions *Prebook Attendance* and *Book Attendance*, see [Working with the Object Manager \[Page 42\]](#).

4. In the *Time period* field, change the date business events should take place if required.
5. Enter the *Language* in which the event should be held where appropriate.
6. Choose  if you have changed data to refresh the display under *business event catalog*.
7. Select the event date you want from the list under *business event catalog*. (This does not apply if you called the function from the *dynamic attendance menu* since the event date is already selected in that case.)
8. Select the *Attendee type* of the attendee you want to book and enter the attendee's name.
If you specified a group attendee type (such as an organizational unit), enter the *number* of bookings.
9. Specify the *booking priority*.



Choose  to access a dialog box in which you can enter a numerical value for the booking priority. The system displays the priority intervals stored in Customizing.

10. There are two *booking* options:
 - a. Choose *Book* if you want to automatically transfer the settlement data that was specified for the attendee type and if you do not want to create a note for the booking operation. Proceed to *Result*.

Booking Attendance

- b. Choose *Book/Payment Info* if you want to check or change the settlement data, create a note for the booking operation, or if you want to allow one of the following billing and allocation functions: billing by payment card, specification of different partner functions for billing, percentage cost distribution to multiple accounting objects for internal activity allocation.

Further Procedure for Book/Payment Info:

When you choose *Book/Payment Info*, the *Fee and Assignment* dialog box appears. All billing or allocation data stored for the attendee type to which the attendee belongs is displayed here. Change data as required:

1. If necessary, change the *settlement type*.
2. If necessary, change the *attendance fee*.



The status indicator beside the *Fee* field indicates whether attendance has already been settled or not.

Enter data for the selected settlement type:

- a. Data entry for the settlement type *billing*:
 - i. Select either *Partner functions* or *Payment card*:

Under *Partner function*, enter a *sales reference number* and, where relevant, *different partner functions*.


or

Under *Payment card*, specify the *cardholder*, *card type* and *number*, and the validity end date of the card.


- ii. Choose .

Payment card data is transferred to *Sales and Distribution* where a plausibility check is carried out. The result of the check is displayed under *card check*. If the check validates the card, data is displayed. If the card fails the check, an error message is output.

Only for *payment cards*:

- iii. Authorize the payment card by choosing  *Payment card*. When you execute the billing report for the attendee (accessed under *Business Events* → *Billing*), the fee is automatically debited from the payment card.




With the settlement type *billing*, you can *simulate the price determination* function by choosing  in this dialog box. The simulation displays the net amount to be billed (including price reductions). All of the relevant billing data must be maintained for the simulation to work. If any data is missing, an error message to this effect is displayed, which you can use to enter the missing data. This function also lets you check at an early stage (*booking*) whether the billing will actually work.



- b. Data entry for the settlement *internal activity allocation*:
 - i. Enter the controlling area(s) and cost center(s) to be debited with attendance fees.

Booking Attendance

You have the option of specifying a percentage cost distribution to multiple cost centers and the account assignment objects *internal orders* and *projects*.



Before you save the data in the dialog box, you can choose  to determine the *standard cost distribution* for attendees of the types *person* and *organizational unit*. The system reads the cost distribution data stored for the attendee and enters it in the cost distribution table. You can use this function if you specified different cost distribution data for an attendee and now want to revert to the original activity allocation data (such as *master cost center*) stored for the attendee.

3. Choose  if you want to create a note for the operation.
4. Choose .

Result

Attendance has been booked and all billing or allocation data stored for later settlement.

See also:

[Book Attendance \[Page 190\]](#)

[Billing \[Page 136\]](#)



[Internal Activity Allocation \[Page 143\]](#)

Booking Multiple Attendees for a Business Event

Use



This function lets you make multiple bookings in one step. You can book multiple attendees (and attendee types) for one business event at one go.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources → Training and Events → Attendance → Book: Attendee List for Business Event*. The *Book Attendee List: Initial Screen* appears.
2. Enter the *Business event type* whose event dates you want to display.
3. In the *Time period* field, enter the period for which you want to make a booking.
4. Where relevant, specify the *language* in which the event should be held.
5. Where relevant, specify the *location* where the event should be held.
6. Choose . Event dates that have been scheduled for the event type you specified are displayed in the *Business Event Catalog*.
7. Select the required event date and choose  *Attendance list*. The *Book Attendee List: Data* dialog box appears.



If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. The *Book Attendee List: Data* dialog box appears in which the event date is already selected.

8. Per list line, enter the *Attendee type* for the attendee (or attendees in the case of a group attendee) you want to book.
9. Enter an *attendee* of the attendee type you selected above.
10. For group attendees, enter the *number* of attendees.
11. Enter the *booking priority*.
12. Select *Fee* if attendance fees are to be charged and you want to enter fee assignment and settlement data for the attendee.
13. Use the same procedure for each of the attendees you want to book.
14. Choose . If you select the *fee* option, you automatically branch to the *Fee and Assignment* for each attendee sequentially where you can enter settlement data as required.
15. Then choose .

Result

You have booked all of the attendees in the list for the event date you selected. You have entered the required billing or activity allocation data for attendance fees per attendee where relevant.

Booking Multiple Attendees for a Business Event

See also:

[Book Attendance \[Page 190\]](#)

[Booking Attendance \[Page 193\]](#)




[Booking an Attendee for Multiple Business Events \[Page 198\]](#)

Booking an Attendee for Multiple Business Events

Use

This function lets you make multiple bookings in one step. You can book one attendee for multiple business events at one go.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Book: Attendee for Business Event List*. The *Book List: Business Events (Initial Screen)* appears.
2. Select the *Attendee type* of the attendee you want to book and enter the attendee's name.
3. Where relevant, specify a *period* during which attendance is possible.
4. Where relevant, specify the *language* in which the event should be held.
5. Where relevant, specify the location in which the events should be held.
6. Choose  Attendance list. The *Book List: Business Events (Initial Screen)* appears.
7. Under *Business Event List*, enter the event dates for which you want to book the attendee. Specify the following data per event date (per list line):
 - For group attendees, enter the *number* of attendees.
 - Specify the *booking priority*.
 - Select *Fee* if attendance fees are to be charged and you want to enter fee assignment and settlement data for the attendee.
8. Use the same procedure for each of the event dates for which you want to make bookings.
9. Choose . If you selected the *fee* option for any or all of the event dates, you automatically branch to the *Fee and Assignment* for each event date sequentially where you can enter settlement data for the attendee as required.
10. Then choose .

Result

You have booked the attendee for all of the event dates in the list. You have entered the required billing or activity allocation of attendance fees for the attendee where relevant.

See also:

[Book Attendance \[Page 190\]](#)

[Booking Attendance \[Page 193\]](#)

[Booking Multiple Attendees for a Business Event \[Page 196\]](#)

Attendance Prebooking

Attendance Prebooking

Use

If there is no business event scheduled in the required period, you can make prebookings for attendees. Prebookings are made for the event type and for a specific time period. As soon as business events of the event type are offered, prebookings can be converted into bookings.

The prebooking function constitutes an additional planning feature by providing important demand information that can be used for reporting purposes.

The information is also used in the *planning* function to determine what demand exists for a business event type on the basis of the prebookings received for it and then to plan a sufficient number of dates to meet the demand.

In the context of *Career and Succession Planning*, prebookings can be regarded as future qualifications to be attained.

See also:

[Business Event Date Planning \[Page 115\]](#)

Features

- Specify prebooking priorities

When you create prebookings, you can specify a prebooking priority that automatically becomes the booking priority when the prebooking is converted.
- Specify location and language

You can specify an event language and/or event location if required.
- Prebook all attendee types
- Create and change attendees when prebooking
- Use note function for prebookings
- Propose prebooking when booking
- Prebook list

The *Prebook List* function lets you make multiple prebookings in one step. You can either prebook one attendee for multiple business event types at one go, or multiple attendees (and attendee types) for one business event type.
- Unlimited prebooking period

The system automatically proposes a default prebooking period dating from the current date to the latest system date (31.12.9999). As a rule, a prebooking is valid from the current date until it is converted to a booking.

The following situations can restrict the prebooking period:

 - The attendee does not exist for the entire period of the prebooking. This would be the case, for example, when a contract of employment has not yet begun or is terminated in the prebooking period.
 - The business event type does not exist for the entire period of the prebooking.

Attendance Prebooking

- You define a different period for the prebooking.
- Special features of N.N. bookings
 - In the case of no-name (N.N.) prebookings, you can change the number of prebookings at a later date.

See also:

[Prebooking Attendance \[Page 201\]](#)

[Prebooking Multiple Attendees for a Business Event Type \[Page 203\]](#)

[Prebooking an Attendee for Multiple Business Event Types \[Page 205\]](#)

Prebooking Attendance

Procedure



1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Prebook: Attendees for Business Event Type*. The *Prebook Attendance: Data Screen* appears.
2. Enter a *business event type* for which you want to prebook attendance. In the *search area* (top left) select the search tool or search variant you want to use to search for the event type, and where relevant enter the required data (such as a search term).
3. In the *selection area* (lower left), select the business event type you require from the hit list found and double-click it. The business event type is automatically transferred to the *work area* (right screen) under *Business event type*.



Alternatively, you can select the business event type directly using the possible entries help in the *work area* (right screen).

If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. You directly access the dialog box *Prebook Attendance: Data* where the event type is already selected.

The dialog box corresponds to the work area that is displayed when you call the individual transaction in the *User Menu* or the *Easy Access Menu*. For more information on the display features in the individual transactions *Prebook Attendance* and *Book Attendance*, see [Working with the Object Manager \[Page 42\]](#).

4. If necessary, enter the period in which the attendee wants to attend the event in the *Period* field. The system automatically proposes a start and end date.
5. In the *Language* field, enter the language in which the business event should be held.
6. Enter a *location* for the business event if required.
7. Select the *Attendee type* of the attendee you want to book and enter the attendee's name.
If you specified a group attendee type (such as an organizational unit), enter the number of prebookings.
8. Enter a *prebooking priority*. The prebooking priority automatically becomes the booking priority when the prebooking is converted.
9. There are two *prebooking* options:
 - a. Choose *Prebook + Note* if you want to create a note for the prebooking. A text editor appears. Choose  to save your note.
 - b. Choose .

Result

You have prebooked the attendee for the business event.

See also:

[Attendance Prebooking \[Page 199\]](#)


Prebooking Multiple Attendees for a Business Event Type

Prebooking Multiple Attendees for a Business Event Type

Use


This function lets you make multiple prebookings in one step. You can prebook multiple attendees (and attendee types) for one business event type at one go.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Prebook: Attendee List for Business Event*. The *Prebooking List per Business Event Type: Initial Screen* appears.
2. Enter the *Business event type* for which you want to make prebookings.
3. Where relevant, specify a selection period during which attendance is possible (prebook period). The system automatically proposes a start and end date. If necessary, you can change this period later on the data screen.
4. Where relevant, specify the *language* in which the event should be held. If necessary, you can change this entry per prebooking later on the data screen.
5. Where relevant, specify the *location* where the event should be held.
6. Choose  *Prebooking list*. The *Prebooking List per Business Event Type: Data Screen* appears.



If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. The *Prebooking List per Business Event Type: Data* dialog box appears with the event type already selected.

7. Enter an *Attendee type* per line of the list or in the case of a group attendee, enter the required attendee types.
8. Enter an *attendee* of the attendee type you selected above.
9. For group attendees, enter the *number* of attendees to be prebooked.
10. Specify the *prebooking priority*. The prebooking priority automatically becomes the booking priority when the prebooking is converted.
11. If required, enter a *prebooking period* for each attendee.
12. If required, enter a *business event language* for each attendee.
13. If required, enter a *business event location* for each attendee.
14. Choose .

Result

You have prebooked all of the attendees on the prebooking list for the event type.

Prebooking Multiple Attendees for a Business Event Type

See also:

[Prebook Attendance \[Page 199\]](#)

[Prebooking Attendance \[Page 201\]](#)

[Prebooking an Attendee for Multiple Business Event Types \[Page 205\]](#)



Prebooking an Attendee for Multiple Business Event Types

Prebooking an Attendee for Multiple Business Event Types

Use

This function lets you make multiple prebookings in one step. You can prebook one attendee for multiple business event types at one go.

Procedure

15. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Prebook: Attendee for Business Event Type List*. The *Prebooking List per Attendee: Initial Screen* appears.
16. Select the *Attendee type* of the attendee you want to prebook and enter the attendee's name.
17. Where relevant, specify a period during which attendance is possible (prebook period). The system automatically proposes a start and end date. If necessary, you can change this period later on the data screen.
18. Where relevant, specify the *language* in which the event should be held. If necessary, you can change this entry per prebooking later on the data screen.
19. Where relevant, specify the location in which the events should be held.
20. Choose  *Prebooking list*. The *Prebooking List per Attendee: Data Screen* appears.
21. Enter the *business event type* per line of the list for which you want to make prebookings.
22. For group attendees, enter the *number* of attendees to be prebooked per business event type.
23. Specify the *prebooking priority*. The prebooking priority automatically becomes the booking priority when the prebooking is converted.
24. If required, enter a prebooking period for each event type.
25. If required, enter a business event language for each event type.
26. If required, enter a business event location for each event type.
27. Choose .

Result

You have prebooked the attendee for all of the event types in the prebooking list.

See also:

[Prebook Attendance \[Page 199\]](#)

[Prebooking Attendance \[Page 201\]](#)

[Prebooking Multiple Attendees for a Business Event Type \[Page 203\]](#)

Attendance Rebooking

Use

You create a rebooking if an attendee booked for a business event wants to change the date of the booking. This involves creating a new booking for the new event date for the same event type. The original booking is automatically deleted.

Features

- You can rebook all bookings of an attendee.
- You can rebook bookings with any booking priority.
- You can partially or completely rebook group attendees.
- You can transfer the settlement data of the original booking or change it by choosing *Book/Payment Info*.
- The same checks are carried out as for bookings.

See also:

[Checks for Individual Attendees \[Page 187\]](#)

[Checks for Group Attendees \[Page 189\]](#)

- Existing prebookings for the attendee on the business event type are automatically deleted.
- Existing waiting-list bookings of the attendee for firmly booked events of the business event type are deleted.
- If integration with *Time Management* is active, the relevant attendance records in *Time Management* are updated when the attendee type *Person* is booked. In this case, the old record is deleted and a new record added.


See also:

[Rebooking Attendance \[Page 207\]](#)

Rebooking Attendance




Rebooking Attendance

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Rebook*. The *Rebook Attendance: Initial Screen* appears.
2. Select the *Attendee type* and enter the pertinent *attendee*.
For group attendees, enter the number of attendees to be rebooked.
3. In the *Time period* field, enter the period of the attendee's original booking.
4. Choose  *data screen*. The *Rebook Attendance: Data Screen* appears.
5. Under *Booked events*, select the business event for which the attendee is booked.
6. Choose *Rebooking offer*. The *Rebook Attendance: Data Screen* appears.



If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. The *Rebook Attendance: Data Screen* appears. For group attendees, enter the *number* of attendees to be rebooked.

7. If there is a rebooking offer available under *business event catalog*, select the new event date for which the attendee is to be rebooked.
8. Specify the required *booking priority*.
9. There are two *rebook* options:
 - a. Choose , if you want to take over the settlement data directly and do not want to create a note.
 - b. Choose *Book/Payment Info* if you want to check and if necessary change the settlement data of the original booking. If you want to create a note, choose . Then choose .

Result

You have rebooked attendance.

See also:

[Rebook Attendance \[Page 206\]](#)

[Booking Attendance \[Page 193\]](#)

Attendance Cancellation

Use

You cancel a booking if an attendee cannot attend the business event.

Features

- You can cancel any type of booking for an attendee.
- If you specify a cancellation reason, it may be used to calculate a cancellation fee. The same billing and activity allocation options are available as for attendance fees (such as payment by credit card).
- You can partially or completely cancel group attendees.
- If there are bookings on the waiting list of the business event and optimum capacity has not yet been reached, the waiting list candidates can be moved up from the list until the optimum capacity has been reached. You specify the move-up procedure in Customizing for Training and Event Management in the step [Control Data \[Ext.\]](#).
- If integration with *Time Management* is active, the relevant attendance records are deleted in *Time Management* when you cancel bookings for attendees of the type *Person*. You make the necessary settings for this in Customizing for *Training and Event Management* under [Define Incompatible Attendance and Absence Types \[Ext.\]](#).


See also:

[Canceling Attendance \[Page 209\]](#)

Canceling Attendance

Canceling Attendance

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Human Resources* → *Training and Events* → *Attendance* → *Cancel*. The *Cancel Attendance: Initial Screen* appears.
2. Select the *Attendee type* and enter the attendee's name.
For group attendees, enter the number of attendees to be canceled.
3. In the *Time period* field, enter the period for which the attendee to be canceled has a booking.
4. Choose  *data screen*. The *Cancel Attendance: Data Screen* appears.
5. Under *Booked events*, select the business event for which the attendee is booked.





If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. The *Cancel Attendance: Data* dialog box appears. For group attendees, enter the number of attendees to be canceled.


6. Enter a cancellation reason if required. The cancellation reason may be used to calculate a cancellation fee. Once you select a cancellation reason, the cancellation % is displayed to indicate the percentage of the attendance fee that is levied for this cancellation reason.



You can create cancellation reasons in Customizing for *Training and Event Management* under [Reasons for Attendance Cancellation \[Ext.\]](#).

7. There are two cancel options:
 - a. If you do not want to enter settlement data different from that which was specified for the attendee when the booking was made or if you do not want to change the cancellation fee or create a note for the operation, choose *Cancel* or .
 - b. Choose *Cancel/Payment Info*, if you want to check or enter settlement data different from that which was specified for the attendee when the booking was made or if you want to change the cancellation fee or create a note for the operation (via ). The dialog box *Fee and Assignment* appears.

Select a settlement type: *internal activity allocation*, *billing*, or *free of charge*.

If you want to levy a cancellation fee, select a settlement type *billing* or *internal activity allocation*. Enter the cancellation fee and the relevant settlement data (such as cost center or controlling area). Then choose .

Result

You have canceled an attendance booking.

See also:

[Cancel Attendance \[Page 208\]](#)

[Booking Attendance \[Page 193\]](#)

Replace Attendance

Replace Attendance

Use

You can replace one booking with another if an attendee booked for a business event cannot take part in it for whatever reason.

Features

- You can replace any bookings of an attendee.
- The settlement data (price and fee assignment) of the attendee being replaced automatically applies to replacement attendees for whom billing or activity allocation was not yet performed. However, if the replacement attendee has a different settlement type, cost center (cost center ID and controlling area), partner function, or payment card data, you can change the settlement data in the *Fee and Assignment* dialog box.

Replacing individual attendees

- When an employee booked for a business event cannot take part in the event, you can replace this attendee with another employee. You do so by replacing one booking with another.
- You can carry out replacements for internal and external business events, in any status. You can also replace bookings for business events that are locked, canceled or historically recorded.
- As a rule, the booking priority, attendance fee, and fee assignment data remains the same when you replace a booking.



However, a dialog box appears querying whether you want to enter different settlement data for the new attendee.

- The same checks are carried out as for bookings and cancellations, with the exception of capacity checks.

Replacing N.N. bookings

- You can replace N.N. bookings, that is, group bookings for companies, organizational units and customers.
- The replacement attendee can be either a group attendee or an individual named attendee.
- It is also possible to partially replace N.N. bookings.



An N.N. booking with 5 attendees for an organizational unit can be replaced with a booking for 2 other members of an organizational unit. The remaining 3 original bookings are still valid.

Result

The original booking is deleted.

The new attendance is booked.

See also:

[Replacing Attendance \[Page 213\]](#)


Replacing Attendance

Replacing Attendance

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Replace*. The *Replace Attendance: Initial Screen* appears.
2. Select the attendee type of the attendee(s) you want to replace. Enter the attendee (also group attendee such as an organizational unit).

For group attendees, enter the *number* of attendees to be replaced.

3. Enter the period in which the attendee's booking occurs in the *Time period* field.
4. Choose  *data screen*. The *Replace Attendance* screen appears.
5. Under *Booked business events* select the business event on which you wish to replace attendance.
6. Choose *Replacement attendee*. The *Replace Attendance* dialog box appears.



If you call the function from the [dynamic attendance menu \[Page 31\]](#), the relevant data is read simply by positioning the cursor on the event type. The *Replace Attendance* dialog box appears. For group attendees, enter the number of attendees to be rebooked.

7. Specify the replacement attendee by selecting the attendee type and entering the attendee (name). You can enter multiple replacement attendees from a group attendee if required.



You can replace group bookings either completely or partially by entering one or more names. If you select a group attendee as replacement attendee, you must also enter the *number*.

8. Choose .

Result

You have replaced the attendance booking.



The settlement data (attendance fee and settlement type) stored for the attendee being replaced automatically applies to the new attendee if you do not want to store different data (settlement type, cost center, partner function, or payment card data) for him or her. If you want to store different settlement data, you can do so in the *Fee and Assignment* dialog box that appears.

See also:

[Replace Attendance \[Page 211\]](#)

Correspondence

Correspondence

Use

The *Correspondence* function lets you output notifications for the various activities and transactions that arise in *Training and Event Management*.

Features

- You can output notifications in *Training and Event Management* either automatically or manually.

You must first carry out the step [Assign Notification Abbreviations and Activities \[Ext.\]](#) in Customizing for *Training and Event Management*.

Forms that serve as templates for the documents you want to output are assigned to the notification abbreviations.
- You can set up automatic output of notifications to a predefined output device or medium for certain activities in *Training and Event Management*.

The output media available include printer, e-mail, fax and telex. If you do not specify an output medium, there is no automatic output.
- From the recipient list, you can access a print preview of the notification you want to output (for manual output).
- You can call the manual output function in the dynamic *Attendance Menu* under *Attendance* → *Correspondence*

When you use the manual output function, you have the additional option of downloading documents into MS Word Form Letter.
- Each item of correspondence output is recorded in a correspondence history that logs what notifications are output to whom.

See also:

The documentation for the Customizing activities in *Training and Event Management* under *Day-to-Day Activities* → *Correspondence*.

[Manual Output of Correspondence \[Page 216\]](#)

[Outputting Correspondence Manually \[Page 218\]](#)

[Correspondence History \[Page 220\]](#)

Manual Output of Correspondence

Use

This function lets you manually trigger output of documents to business event attendees and instructors in *Training and Event Management*.

This function supplements the automatic output function in that it lets you output documents manually as required if errors occurred during automatic output or you require additional documents.

Features

- Output to any medium, for example, printer or Internet mail.



If you select a medium for manual output, you override the standard settings made in Customizing for *Training and Event Management* under [Define Attendee Type Specific Output Control \[Ext.\]](#).

If there is no medium set in Customizing and you do not specify one for manual output, documents are output to printer by default.

- Output using the *Microsoft Word Standard Letter* function



This function is only available with manual output.

- Output to screen
- Display print preview of notification
- Display log of documents output
- Display correspondence history for recipients

Activities


1. You access this function on the *SAP Easy-Access* screen under *SAP Standard Menu* → *Human Resources* → *Training and Events* → *Attendance* → *Correspondence* → *Manual Output* or in the *Attendance Menu* under *Attendance* → *Correspondence* → *Manual Output*.
2. You enter an activity and a notification abbreviation (assigned to a specific notification).
3. You select an output medium as required.
4. You specify the business event and attendees for which you want to output the notification.
5. You use the functions available on the recipient list screen (for example, print preview or download to MS Word).
6. You trigger output.

See also:

[Outputting Correspondence Manually \[Page 218\]](#)


Outputting Correspondence Manually

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Attendance* → *Correspondence* → *Manual Output*.
2. Enter the required activity and a *notification abbreviation*.
3. Choose  *data screen*.
4. Enter the *business event* for which you want to output notifications.
5. Enter an *attendee type* where relevant.
6. Enter an *attendee* corresponding to the attendee type specified.



Entries 5 and 6 are optional. If you make no input, all attendees booked are proposed as recipients.

7. Enter the number of N.N. notifications (for group attendees) you want output.
8. Choose .

List screen:

1. Select the attendees in the recipient list for whom you want to output notifications.
2. If required, change the default output medium (multiple selection possible).
3. Use the functions available on the recipient list screen, where required:



Print preview



MS Word



MS Word Standard Letter



Screen output



Display log



Display booking data



Display correspondence history

4. Choose .

Result

The notification is output to the selected output medium.

See also:

[Manual Output of Correspondence \[Page 216\]](#)

[Correspondence \[Page 215\]](#)

Correspondence History

Use

The *Correspondence History* function records the individual items of correspondence output for activities in *Training and Event Management*.

If you set output to automatic, you can use the history function monitor document output.

For example, you can use the history function to report on what documents have been sent to attendees in a given time period or if and when an attendee received definite confirmation of registration, a cancellation notification and so on.

Features

You can request reports with the correspondence history functions from four different perspectives:

- *From the perspective of the event type*
If you enter a business event type, all documents that have been output in connection with the business event type, such as prebooking notifications, are listed.
- *From the perspective of the event*
If you enter a business event, all documents that have been output in connection with the business event, such as confirmations of registration, are listed.
- *From the perspective of the output agent*
If you enter an output agent, the report lists all documents that have been output manually or automatically by the agent in question. For example, if a booking operation triggered automatic output of notification to the recipients, these notifications are listed.
- *From the perspective of the recipient*
If you enter a recipient, the report lists all documents that have been output to the recipient you enter.

Within the various views, you can select data to narrow down the report's output:

- Document *recipients*
- *Booking priority*: you can request a report on all of the notifications output to waiting list attendees, for example.
- *Selection period*: you can specify a time period yourself or select a predefined one.
- *Output status*: you can select from the following statuses:
 - No output
 - Errors during output
 - Output triggered
 - Output successful
- Activity (logical function code).

Correspondence History



You can start the correspondence history function from the *Attendance* menu. There, you can select a business event type, an event date, or an attendee. By doing so, you select the data for the report.

Activities

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Correspondence* → *History*. The *Correspondence History* selection screen appears.
2. You specify the perspective from which you want reporting carried out: event type, event, output agent, or recipient.
3. You enter a document recipient if required.
4. You can specify the attendee group by selecting a booking priority.
5. You can specify the reporting period for the correspondence history.
6. You can select one or multiple output statuses.
7. You can specify a particular activity by selecting a function code from the list displayed.
8. Choose *Execute*.

The system outputs a correspondence history based on the selection criteria you specified.

Recurring Activities

Purpose

Recurring Activities in *Training and Event Management* comprises all of the activities that are carried out once business event dates have been created or planned, with the exception of booking activities and correspondence functions that are grouped under *Day-to-Day Activities*.



Most of the following activities are optional. The only required activity is the activity *Firmly book business event* if you want to settle fees or do follow-up processing for the event.

See also:

[Business Event Cancellation \[Page 223\]](#)

[Firmly Book Business Event \[Page 226\]](#)

[Business Event Follow-Up Processing \[Page 230\]](#)

[Appraisals \[Page 233\]](#)

Business Event Cancellation

Use

You can cancel both internal and external business events in both planned and firmly booked status. When you cancel a business event, the system appends the relevant flag to it.

Features

- You can rebook attendees for another event of the same type. The system automatically proposes an alternative date (where available).
- You can create prebookings for booked and unplaced attendees (on the waiting list). Alternatively, you can leave them on the waiting list.



You specify whichever of these two options you wish to use in Customizing for *Training and Event Management* under *Recurring Activities* → *Firmly Book/Cancel* → *Control Data* in the SEMIN FIXRV entry.

When you firmly book a business event, you can also specify what the system response should be in a specific case, thus overriding the Customizing settings. You do so by choosing *Settings* → *Procedure Waiting List*. This does **not** change the standard settings in Customizing.

Results

- The status *firmly booked* is automatically assigned to the business event.
- The business event no longer features in the business event catalog.
- Resources reserved for the business event are released again.
- No further bookings can be made for a canceled business event.
- Attendees that remain on the waiting list are considered *rebookable*. You can display a list of attendees that are still to be rebooked with the function *Attendance* → *Book* → *To be rebooked*.
- You can display a list of attendees for whom a prebooking was made, choose *Attendance* → *Book* → *Prebooked*.



Cancellation of a business event is final and irrevocable. Once a business event has been canceled, it cannot ever be held. Thus, if you simply want to remove a business event temporarily from the business event catalog, you should use the *Lock* function.

See also:

[Lock Business Events \[Page 124\]](#)

[Canceling a Business Event \[Page 225\]](#)

Canceling a Business Event





Canceling a Business Event

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Firmly Book/Cancel*. The *Firmly Book Business Event* screen appears.
2. Under *Business Event*, select the event you want to cancel.



If you call the *Cancel* function from the *dynamic business event menu* by choosing *Business event* → *Firmly book/Cancel* and have the cursor positioned on the relevant event, you directly access the *Firmly Book/Cancel Business Event* screen with the business event already selected.

3. Choose *Cancel* in the *Editing* frame.
4. Enter the earliest date for a rebooking in the *Rebooking as of* field in the *Additional data* frame. The default date proposed by the system is the current date.
5. Choose  *data screen*.
 - a. If there are no bookings for the event, confirm that you want to cancel the event in the *Change Editing* dialog box that appears. In the dialog box *Cancellation Reason: Optional Entry*, you can then enter a cancellation reason. Choose  after making your entry.
 - b. If there are bookings for the event, you access the dialog box *Rebookings*.
 - i. The system automatically makes a rebooking proposal for booked attendees. Attendees that cannot be rebooked may be either prebooked for the event type or may remain on the waiting list.
 - ii. Select attendees on the list for rebooking.
 - iii. Choose . The *Cancellation Reason: Optional Entry* dialog box appears. If required, enter a cancellation reason and choose .

Result

- You have canceled the business event.
- Reserved resources are released.
- The required rebookings have been made.

See also:

[Business Event Cancellation \[Page 223\]](#)

Firmly Book Business Event

Use

Once you have decided that a business event is to take place definitely, you can firmly book it. The function *firmly book* automatically triggers other activities: Attendees receive definite confirmation of registration, candidates with waiting-list bookings are either rebooked for other events, converted into prebookings for the event type, or remain on the waiting list.

You must use the *firmly book* function if you want to carry out follow-up processing for an event.

See also:

[Business Event Dates \[Page 96\]](#)

Prerequisites

- The business event is in *planned* status.
- There are attendees already booked for the business event.

Features

- Business events and their infotype records in *planned* status are converted to *firmly booked* status.



You can firmly book a business event once only.

- If the capacity of the business event has not been reached, attendees on the waiting list are automatically moved up to the attendee list until optimum or maximum capacity is reached.

See also:

[Booking Priorities \[Page 185\]](#)

- You can edit the attendee list (*swap attendees*):
If there is a waiting list of unplaced candidates for the event, you can swap attendees on the attendee list with waiting-list attendees. (Bookings with *essential* priority cannot be swapped.) You swap bookings by selecting the attendees concerned on both lists and choosing *Swap selected*.
- A rebooking proposal is generated for any bookings that are still on the waiting list when the event is firmly booked. You can accept or reject the rebooking proposal per attendee.
- The remaining unplaced candidates can be converted into prebookings or left on the waiting list.



You specify whichever of these two options you wish to use in Customizing for *Training and Event Management* under *Recurring Activities* → *Firmly Book/Cancel* → *Control Data* in the SEMIN FIXRV entry.

When you firmly book a business event, you can also specify what the system response should be in a specific case, thus overriding the Customizing settings. You

Firmly Book Business Event

do so by choosing *Settings → Procedure Waiting List*. This does **not** change the standard settings in Customizing.

- Attendees that remain on the waiting list are considered *rebookable*. You can display a list of attendees that are still to be rebooked with the function *Attendance → Book → To be rebooked*.
- You can display a list of attendees for whom a prebooking was made by choosing *Attendance → Book → Prebooked*.
- You specify the type of notifications you want output once a business event has been firmly booked in Customizing for *Training and Event Management* under *Day-to-Day Activities → Correspondence → Notification Abbreviations → Assign Notification Abbreviations and Activities*.

See also:


[Firmly Booking a Business Event \[Page 228\]](#)

[Business Event Cancellation \[Page 223\]](#)

[Rebookings \[Page 206\]](#)

Firmly Booking a Business Event

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Firmly Book/Cancel*. The *Firmly Book Business Event* screen appears.
2. Decide whether you want to allow bookings to be made up to maximum or optimum capacity. In the *Editing* frame, select either *Firmly book (optimum)* or *Firmly book (maximum)*.
3. If necessary, change the earliest date for a rebooking in the *Rebooking as of* field in the *Additional data* frame. The default date proposed by the system is the current date.
4. Choose  *data screen*.






If the number of bookings is less than the minimum capacity prescribed, a dialog box appears where you can change the editing mode. You can decide if you want to cancel the business event in this case. You cannot firmly book a business event for which there are no attendance bookings.

If the number of bookings has reached the minimum capacity prescribed, you access the screen *Firmly Book Business Event: Display Attendee List*.

5. If required, you can swap attendees if the waiting list of the event has *unplaced attendees* on it and you want to review the attendee list:
 - a. Under *Placed attendees*, select an attendee to be removed from the attendee list and put back on the waiting list.
 - b. Under *Unplaced attendees*, select an attendee to be included in the attendee list.
 - c. Choose *Swap selected*.



You can only swap *placed attendees* who have *normal priority* bookings, not attendees with *essential priority* bookings. These may not be displaced.

6. Choose  *without rebooking* if you do not want to edit the waiting list any further.
7. If you want to rebook the unplaced attendees for another business event, choose  *with rebooking*.
8. A list of possible rebooking or prebooking proposals or the list of remaining waiting list bookings is generated. Select the required rebooking per attendee.
9. Choose .

Result

You have firmly booked the business event with the reviewed attendee list. The required rebookings and prebookings have been made or the waiting list has been retained (depending on the values set in the switch SEMIN FIXRV).

Firmly Booking a Business Event

See also:

[Firmly Book Business Event \[Page 226\]](#)

Business Event Follow-Up

Use

Once a business event has begun or is given the status *firmly booked*, you can perform follow-up activities for it.

Prerequisites

- The business event must be in *firmly booked* status.
- The business event may not be canceled.
- The business event may not have a historical record flag (see below).

Features

- The business event objectives can be awarded as qualifications to the attendees. If the objectives are to be transferred as qualifications to the attendees during follow-up processing, you must assign a value to the qualifications. This value is stored in the additional data of the relationship that is created between the attendee and the qualification.
- The booking record (*business event/attendee* relationship) is deleted if you have specified this in Customizing (see below).
- A relationship is created between the business event type and the attendee if you have specified this in Customizing (see below).



The above activities depend on the procedure settings you make in Customizing for *Training and Event Management* under *Recurring Activities* → *Follow-Up Processing*.

This procedure defines:

- Assignment of qualifications to attendees
- Creation of relationships between the attendee and the business event type.
- Deletion of relationships between the attendee and the business event.

If you want to define a special procedure for a particular event type, you can do so using the *Procedure* infotype 1030.

- A historical record flag is appended to the business event if you specified this on the initial screen under *Additional data*.



A business event with a historical record flag can no longer be changed in any way. Historically recording is irrevocable.

- *Confirmation of attendance* notifications are automatically issued for all attendees. You make the required settings for notification output in Customizing for *Training and Event Management* under *Day-To-Day Activities* → *Correspondence* → *Output control*.

Business Event Follow-Up

The above-mentioned actions are only carried out for bookings with *normal* or *essential* priority, not for waiting-list bookings.

Result

- The business event objectives are awarded as qualifications to attendees.
- The booking record is deleted if so specified in [Procedure \[Page 364\]](#).
- The attendance history is created if so specified.
- *Confirmation of attendance* notifications are automatically issued for all attendees.
- The business event has been historically recorded where relevant.



Historically recorded business events do not feature in the business event catalog.

See also:


[Following Up a Business Event \[Page 232\]](#)

[Procedure \(Infotype 1030\) \[Page 364\]](#)

Following Up a Business Event

Procedure

Initial screen:

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Follow up*. The *Follow Up Business Event* screen appears.
2. Enter the business event you want to follow up.
3. If you want to historically record the business event, under *Additional specifications*, select *Historically record business event*.
4. Choose  *data screen*. The *Follow Up Business Event: Qualifications and Actions* screen appears.
5. A list appears with details of the qualifications to be assigned and actions to be executed. Complete the *Valuation of qualifications* field as appropriate.

You can preset the qualification valuation (for all attendees) if you want by choosing *Set valuation*.

If required, make an attendee-specific valuation by specifying a proficiency in the list.

6. Choose .

Result

- Follow-up processing has been carried out for the business event.
- Qualifications have been awarded to the attendees where relevant.
- The attendee record has been deleted if so specified in the *Procedure* infotype.
- An attendance history has been created where relevant.
- The business event has been historically recorded where relevant.
- *Confirmation of attendance* notifications are issued (as per output control specifications).

See also:

[Business Event Follow-Up Processing \[Page 230\]](#)

Appraisals

Appraisals

Use

The *Appraisal* function in *Training and Event Management* enables you to perform appraisals of business events and attendees. This provides you with an important method of quality assurance and keeps you informed of the level of knowledge and qualification of your employees.

From *Training and Event Management*, you have direct access to the appraisal system of the *Personnel Development* application component, which offers a wide range of sophisticated appraisal functions.

See also:

[Appraisal Systems \[Ext.\]](#)

Features

The *Training and Event Management* component contains two [forms of appraisal \[Ext.\]](#): [business event appraisal \[Page 235\]](#) and [attendee appraisal \[Page 238\]](#). You access these either from the main menu of the application or via the dynamic menus.

In attendee appraisals, the instructor evaluates the attendees; in a business event appraisal the attendees evaluate the event.

You can

- Plan and prepare appraisals
- Perform appraisals
- Perform reporting for appraisals
- Compare appraisals
- Manage appraisals
- Create anonymous individual appraisals
- Use qualifications as appraisal elements
- Transfer qualifications to profiles on the basis of appraisals
- User multiple forms of appraisal for attendee and business event appraisals
- Specify other forms of appraisal for business event and attendee appraisals by creating relationships



Training and Event Management only supports the [appraisal type \[Ext.\]](#) *individual appraisal*. It does not support the appraisal type *group appraisal*.

See also:

[Business Event Appraisal \[Page 235\]](#)

[Attendee Appraisal \[Page 238\]](#)

[Reports for Appraisals \[Page 241\]](#)

[Features of the Appraisal Systems Component \[Ext.\]](#)

['To Do' List Creation \[Ext.\]](#)

Business Event Appraisals

Business Event Appraisals


Definition

Evaluation of an event by an attendee according to predefined appraisal criteria.

Use

Education and training events supported by a company should naturally be effective. By collecting and collating appraisal data for events, an employer can gain valuable feedback. *Training and Event Management* contains such a form of appraisal.

Features

- Attendees can evaluate the business events they attend.
- You can hold anonymous individual appraisals.
- You can specify per business event type what form of appraisal should be used.
- You can use any form of appraisal you choose to appraise a business event.
- Appraisal elements (criteria and criteria groups) are defined via the form of appraisal. Each criterion can have its own specific valuation.
- Attendees can award a score or value to each criterion and add a note if desired. You access the *note function* via  beside each appraisal criterion. You access the editor by clicking the icon.

See also:


[Appraising a Business Event \[Page 236\]](#)

[Appraisals \[Page 233\]](#)

[Attendee Appraisal \[Page 238\]](#)

Appraising a Business Event


Procedure


1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Appraisals*. The *Generate 'To Do' List* dialog box appears.
2. Change the default *Appraisal period* if required.
3. Select an *attendee type* as appraiser using the possible entries function.
4. Enter an appraiser corresponding to the *object type* you specified.
5. Enter the business event to be appraised. The object type is already defaulted by the system.
6. Choose . The *Generate 'To Do' List* data screen appears displaying the selected business event.



If you call the *Appraisal* function from the *dynamic business event menu* by choosing *Business event* → *Appraisals* → *Create* and have the cursor positioned on the relevant event, you directly access the *Generate 'To Do' List* screen with the business event already selected.




7. Select the business event to be appraised.
8. If required, select *Anonymous appraiser*. In this case, you must execute the appraisal directly since it is not possible to generate a 'to do' list for anonymous appraisals.

Or choose  Complete preparation. You have now created an appraisal 'to do' list. You can create the appraisal at a later date.

9. Choose  to create the appraisal. The *Change Appraisal* data screen appears displaying the header data (appraiser, appraisee, appraisal period, and creation data) and the appraisal sheet for the business event appraisal.



You create the sample business event appraisal in Customizing for *Training and Event Management under Recurring Activities* → *Appraisals* → *Edit Appraisal Catalog*.

10. Enter a *criterion value* for each *criterion*.
11. If you want to store a user-definable text for each criterion or for the business event generally, do so by choosing .
12. Choose  if you plan to create the appraisal and make changes to it later. Choose  Complete if you want to make no further changes to it.

Result:

You have created or completed the business event appraisal.

See also:

[Business Event Appraisal \[Page 235\]](#)

Appraising a Business Event

Attendee Appraisal

Definition

Evaluation of an attendee by an instructor according to predefined appraisal criteria.




The instructor of a company training event evaluates attendees using predefined appraisal criteria, such as knowledge of the subject matter, team skills, or active participation.

The instructor awards points for each criterion and adds a note if required. For example, knowledge of subject matter: 3 points. Note: The attendee has one year's experience and shows good aptitude for the subject.

Use

Companies that engage and invest in training and development of their employees naturally expect their efforts to be efficient and effective. In addition, it may be useful to be informed about the kind of target groups that attend a particular training event. An *attendee appraisal* can be used to determine the characteristics of such a group. *Training and Event Management* contains such a form of appraisal.

Features

- Create appraisals for all attendees of a training event *Exception: N.N. bookings for group attendees*
- You can hold anonymous individual appraisals.
- Specify per business event type what form of appraisal should be used as attendee appraisal.
- Use any form of appraisal you choose to appraise an attendee.
- Define appraisal elements (criteria and criteria groups) via the form of appraisal. Each criterion can have its own specific valuation.
- Assign a score or value to each criterion and add a note if desired. You access the *note function* via  beside each appraisal criterion. You access the editor by clicking the icon.

See also:

[Appraising an Attendee \[Page 239\]](#)

[Appraisals \[Page 233\]](#)

[Business Event Appraisal \[Page 235\]](#)

Appraising an Attendee


Appraising an Attendee

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Attendance* → *Appraisals*. The *Generate 'To Do' List* dialog box appears.
2. Change the default *Appraisal period* if required.
3. Enter a *business event*. The object type is already defaulted by the system.
4. Select an *attendee type* to be appraised using the possible entries function.
5. Enter an appraiser corresponding to the *object type* you specified.





Specification of an attendee is optional. If you make no entry, the system displays all attendees of the business event for selection.

6. Choose . The *Generate 'To Do' List* data screen appears displaying the attendees of the selected business event.






If you call the *Appraisal* function from the *dynamic attendance menu* by choosing *Attendance* → *Appraisals* → *Create* and have the cursor positioned on the relevant event, you directly access the *Generate 'To Do' List* screen with the business event already selected and a list of the attendees displayed.

7. Select the attendees to be appraised.
8. If required, select *Anonymous appraiser*.
9. Choose  *Complete preparation*. You have now created an appraisal 'to do' list. You can create the appraisal at a later date. Otherwise proceed with step 10.
10. Choose  to create the appraisal. The *Change Appraisal* data screen appears displaying the header data (appraiser, appraisee, appraisal period, and creation data) and the appraisal sheet for the attendee appraisal.



You create the sample attendee appraisal in Customizing for *Training and Event Management under Recurring Activities* → *Appraisals* → *Edit Appraisal Catalog*.

11. Enter a *criterion value* for each *criterion*.
12. If you want to store a user-definable text for each criterion or for the attendee appraisal generally, do so by choosing .
13. Choose  if you plan to create the appraisal and make changes to it later. Choose  *Complete* if you want to make no further changes to it.

Result

You have created or completed an attendee appraisal.

See also:

[Attendee Appraisal \[Page 238\]](#)

Reports for Appraisals

Reports for Appraisals

Use

This function lets you request reports for appraisals created for attendees and business events in *Training and Event Management*. You can also determine what attendees or business events have not yet been appraised.



You access these reports in the *Information Menu* of *Training and Event Management* under *Attendance* → *Attendee Appraisals* and under *Business Event* → *Business Event Appraisals*.

See also:

[Attendee Appraisal \[Page 273\]](#)

[Business Event Appraisal \[Page 314\]](#)

Attendee Appraisals (Report RHXEVALP)

Use

This report generates a list of appraisals created for attendees of business events. You can also request the report to display attendees that have not yet been appraised.

See also:

[Appraisals \[Page 233\]](#)

Features

If there are multiple appraisal models for the [form of appraisal \[Ext.\]](#) *attendee appraisal*, you can select an [appraisal model \[Ext.\]](#) for the report. If you want to select an appraisal model that is not assigned to the form of appraisal, choose *Further appraisal models*.

You can select one or more [appraisal elements \[Ext.\]](#) for the appraisal model by choosing *Further selection criteria*. (If you select more than one appraisal element, there is a logical AND link between them.) You can assign a valuation to each appraisal element.

In this way, the report only selects attendees that have a pre-defined appraisal element valuation (for example, attendees that have the valuation 2 = *good* for the appraisal element *specialist knowledge*).



If you chose *Further selection criteria*, then in the dialog box *Catalog: Display Appraisal Model*, you must select appraisal elements for the same appraisal models that you set under *Appraisal Model* on the selection screen. Otherwise, the report will not function correctly.

Selection

You can set parameters to determine the data output by the report.

Period appraised

You can specify any period for the reporting.

Period created

You can specify the period when the appraisal was created.

Appraiser:

Since you are reporting on attendee appraisals here, the *business event* is selected by default. . Enter the business event(s) whose attendee appraisals you want included in the report.

Appraisee

Enter the attendee type(s) and the relevant attendee(s) to be included in the report.



Depending on what data you are reporting on, specify either *Appraiser* or *Appraisee*. If you are interested in all of the attendee appraisals of a business event, enter only the business event. On the other hand, if you are interested in the appraisals made

Attendee Appraisals (Report RHXEVALP)

of a certain attendee for all business events in a given period, specify the attendee only.

AND/OR

This parameter links the entries made for *appraiser* and *appraisee*. These entries are only significant if you have specified both *appraiser* and *appraisee*.

. The parameters let you define certain constellations for the search for appraisers and appraisees.

How the link affects selection:

- Appraiser A **and** appraisee B
 - All appraisals in which A is the appraiser and B the appraisee
- Appraiser A **or** appraisee B
 - All appraisals in which A is the appraiser
 - All appraisals in which B is the appraisee

Without appraisal/Display existing

If you select this indicator, the report only considers attendees of events that have not yet been appraised.

Do not select this indicator if you want to see existing appraisals.

If you select both of these indicators, the report considers both existing appraisals and attendees not yet appraised.

Appraisal status

You can specify an appraisal status for the report:

Individual/Overall/Subappraisals

Here you can select one or both [appraisal types \[Ext.\]](#).

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Appraiser (business event)
- Appraisee (attendee)
- Appraisal
- Status of appraisal
- Appraisal type

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).



You can execute the following functions from the list screen:

- Create average valuations
- Display the ranking

Attendee Appraisals (Report RHXEVALP)

- Compare appraisals
- Display, change, create, delete, rename appraisals and reset appraisal status to *in process*

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.
3. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Business Event Appraisals (Report RHXEVALV)

Business Event Appraisals (Report RHXEVALV)

Use

This report generates a list of appraisals created by attendees of business events. You can also request the report to display events that have not yet been appraised.

See also:

[Appraisals \[Page 233\]](#)

Features

If there are multiple appraisal models for the [form of appraisal \[Ext.\]](#) *business event appraisal*, you can select an [appraisal model \[Ext.\]](#) for the report. If you want to select an appraisal model that is not assigned to the form of appraisal, choose *Further appraisal models*.

You can select one or more [appraisal elements \[Ext.\]](#) for the appraisal model by choosing *Further selection criteria*. (If you select more than one appraisal element, there is a logical AND link between them.) You can assign a valuation to each appraisal element.

In this way, the report only selects business events that have a pre-defined appraisal element valuation (for example, business events where the appraisal element *training materials* received the valuation *Contents 1 = very good*).



If you chose *Further selection criteria*, then in the dialog box *Catalog: Display Appraisal Model*, you must select appraisal elements for the same appraisal models that you set under *Appraisal Model* on the selection screen. Otherwise, the report will not function correctly.

Selection

You can set parameters to determine the data output by the report.

Period appraised

You can specify any period for the reporting.

Period created

You can specify the period when the appraisal was created.

Appraiser:

Enter the attendee type(s) and the relevant attendee(s) that created the appraisals.

Appraisee

Since you are interested in a business event appraisal (appraisal of an event by an attendee), the *business event* option is selected by default. Enter the business event(s) whose appraisals you want included in the report.



Depending on what data you are reporting on, specify either *Appraiser* or *Appraisee*. On the other hand, if you are interested in the appraisals made by a certain attendee

Business Event Appraisals (Report RHXEVALV)

of all business events in a given period, specify the attendee only. On the other hand, if you are interested in appraisals of a specific event created by its attendees, enter only the business event.

AND/OR

This parameter links the entries made for *appraiser* and *appraisee*. These entries are only significant if you have specified both *appraiser* and *appraisee*.

. The parameters let you define certain constellations for the search for appraisers and appraisees.

How the link affects selection:

- Appraiser A **and** appraisee B
 - All appraisals in which A is the appraiser and B the appraisee
- Appraiser A **or** appraisee B
 - All appraisals in which A is the appraiser
 - All appraisals in which B is the appraisee

Without appraisal/Display existing

If you select this indicator, the report only considers events that have not yet been appraised.

Do not select this indicator if you want to see existing appraisals.

If you select both of these indicators, the report considers both existing appraisals and business events not yet appraised.

Appraisal status

You can specify an appraisal status for the report:

Individual/Overall/Subappraisals

Here you can select one or both [appraisal types \[Ext.\]](#).

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Appraiser (attendee)
- Appraisee (business event)
- Appraisal
- Status of appraisal
- Appraisal type

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).



You can execute the following functions from the list screen:

- Create average valuations
- Display the ranking

Business Event Appraisals (Report RHXEVALV)

- Compare appraisals
- Display, change, create, delete, rename appraisals and reset appraisal status to *in process*

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.
3. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Reports in Training and Event Management

Reports in Training and Event Management

Use

Training and Event Management offers extensive and comprehensive reporting functions. You can request a wide variety of reports for business events, resources, and attendees quickly and efficiently, be it for training and event costs, business event appraisals, attendee appraisals, or missing resources.

Integration

You start reporting from the *Training and Event Management dynamic information menu*. From here, you can directly access the *business event menu* or the *attendance menu*.

You can also access all reports on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources → Training and Events → Information System → Reports*.

See also:

[Dynamic Information Menu \[Page 252\]](#)

Features

- You can request reports on the three key areas of *Training and Event Management*:

For attendance:

[Attendee List \[Page 257\]](#)

[Attendance List \[Page 259\]](#)

[Employee list \[Page 261\]](#)

[Bookings per Attendee \[Page 263\]](#)

[Attendee's Training History \[Page 265\]](#)

[Attendance Prerequisites \[Page 267\]](#)

[Attendee's Qualifications \[Page 269\]](#)

[Prerequisites Matchup \[Page 271\]](#)

[Attendee Appraisal \[Page 273\]](#)

[Prebookings per Business Event Type \[Page 276\]](#)

[Prebookings per Attendee \[Page 278\]](#)

[Attendees to Be Rebooked \[Page 280\]](#)

[Attendance Statistics \[Page 319\]](#)

[Attendance and Sales Statistics \[Page 284\]](#)

[Cancellations per Business Event \[Page 286\]](#)

[Cancellations per Attendee \[Page 288\]](#)

[Budget Comparison \[Page 290\]](#)

For resources:

Reports in Training and Event Management

[Resource Equipment \[Page 294\]](#)

[Resource Reservation \[Page 296\]](#)

[Instructor Information \[Page 298\]](#)

[Graphical Resource Reservation \[Page 300\]](#)

[Available/Reserved Resources \[Page 302\]](#)

[Resource Reservation Statistics \[Page 304\]](#)

[Resources Not Yet Assigned per Resource Type \[Page 306\]](#)

For business events:

[Business Event Demand \[Page 310\]](#)

[Business Event Schedule \[Page 312\]](#)

[Business Event Appraisal \[Page 314\]](#)

[Business Event Hierarchy \[Page 317\]](#)

[Attendance Statistics \[Page 319\]](#)

[Business Event Brochure \[Page 321\]](#)

[Business Event Information \[Page 325\]](#)

[Business Event Dates \[Page 327\]](#)

[Resource List per Business Event \[Page 329\]](#)

[Resources Not Yet Assigned per Business Event \[Page 331\]](#)

[Material Requirements per Business Event \[Page 341\]](#)



[Business Event Prices \[Page 336\]](#)

- You can specify the selection criteria for each report.
- You can download the report output into WinWord.
- Graphical reporting is also available, for example, the *Graphical Resource Reservation* report.
- You can integrate your own, customer-specific reports with ease and efficiency.
- You can specify whether reporting is started via a selection screen by choosing *Settings* in the *dynamic information menu*.

See also: [Switching the Selection Screen On and Off \[Page 25\]](#)

Activities

From the *Training and Event Management dynamic information menu*, under *Information* choose which of the three areas you want to request reports for: *business events*, *resources*, or *attendance*. A dialog box appears listing the reports available in the selected area.

Select the required report and choose . The report's selection screen appears (if you have set the *Display selection screen* option under *user-specific settings*). Enter selection parameters as required and choose . The report output is displayed in list form or graphically.

Reports in Training and Event Management

If the selection screen option is not active, you select the data you want included in the report using the cursor. In the event of an invalid selection, the report starts via the selection screen.

Dynamic Information Menu

Definition

[Dynamic menu \[Page 16\]](#) you use to request reports for attendance, resources, and business events.

Use

The *dynamic information menu* lets you request reports for business events, resources, or attendance directly from any level of the structure.

The following reports are available:

For attendance:

- [Attendee List \[Page 257\]](#)
- [Attendance List \[Page 259\]](#)
- [Employee list \[Page 261\]](#)
- [Bookings per Attendee \[Page 263\]](#)
- [Attendee's Training History \[Page 265\]](#)
- [Attendance Prerequisites \[Page 267\]](#)
- [Attendee's Qualifications \[Page 269\]](#)
- [Prerequisites Matchup \[Page 271\]](#)
- [Attendee Appraisal \[Page 273\]](#)
- [Prebookings per Business Event Type \[Page 276\]](#)
- [Prebookings per Attendee \[Page 278\]](#)
- [Attendees to Be Rebooked \[Page 280\]](#)
- [Attendance Statistics \[Page 319\]](#)
- [Attendance and Sales Statistics \[Page 284\]](#)
- [Cancellations per Business Event \[Page 286\]](#)
- [Cancellations per Attendee \[Page 288\]](#)
- [Budget Comparison \[Page 290\]](#)

For resources:

- [Resource Equipment \[Page 294\]](#)
- [Resource Reservation \[Page 296\]](#)
- [Instructor Information \[Page 298\]](#)
- [Graphical Resource Reservation \[Page 300\]](#)
- [Available/Reserved Resources \[Page 302\]](#)

Dynamic Information Menu

- [Resource Reservation Statistics \[Page 304\]](#)
- [Resources Not Yet Assigned per Resource Type \[Page 306\]](#)

For business events:

- [Business Event Demand \[Page 310\]](#)
- [Business Event Schedule \[Page 312\]](#)
- [Business Event Appraisal \[Page 314\]](#)
- [Business Event Hierarchy \[Page 317\]](#)
- [Attendance Statistics \[Page 319\]](#)
- [Business Event Brochure \[Page 321\]](#)
- [Business Event Information \[Page 325\]](#)
- [Business Event Dates \[Page 327\]](#)
- [Resource List per Business Event \[Page 329\]](#)
- [Resources Not Yet Assigned per Business Event \[Page 331\]](#)
- [Material Requirements per Business Event \[Page 341\]](#)
- [Business Event Prices \[Page 336\]](#)

A major advantage of the *dynamic information menu* is that the data extracted by the reports is transferred directly from the structure, which saves you the trouble of entering it manually on a report selection screen.



For example, you want to check resource reservations for a certain business event date. You simply position the cursor on the event date and choose the report *Resource List per Business Event*.

You can also enter report data manually by starting a report without making any selection beforehand.

You can specify whether you want to start reports from the selection screen or not using the *user-specific settings*. You can make a variety of other settings regarding data display and maintenance in the dynamic menus under *user-specific settings*.

See also:

[User-Specific Settings \[Page 19\]](#)

Integration

You can branch to the [business event menu \[Page 29\]](#) or the [attendance menu \[Page 31\]](#) directly from the *information menu*. Data is automatically updated when you access one of these options. You access the same level of the structure as the one you leave.



You access the *information menu* on the *SAP Easy Access* screen in the *SAP Standard Menu* under *Human Resources* → *Training and Events* → *Info Systems* → *Information Menu*.

Dynamic Information Menu

Since the *information menu* gives you optimum access to frequently used reporting functions in *Training and Event Management*, it is a good idea to add it to your *Favorites*.

See also:

[Dynamic Menus \[Page 16\]](#)

Reports for Attendance

Reports for Attendance

Use

The reports you can request for attendees in *Training and Event Management* give you access to a wide range of important data regarding attendance bookings. Generally speaking, the reports fall into three categories:

- Reports that support the business event process (*Attendance Lists*)
- Reports that support the training administrator in the day-to-day business of *Training and Event Management* (e.g. *Attendees to Be Rebooked*)
- Reports that are requested purely for information or statistical purposes (e.g. *Cancellations per Business Event*)

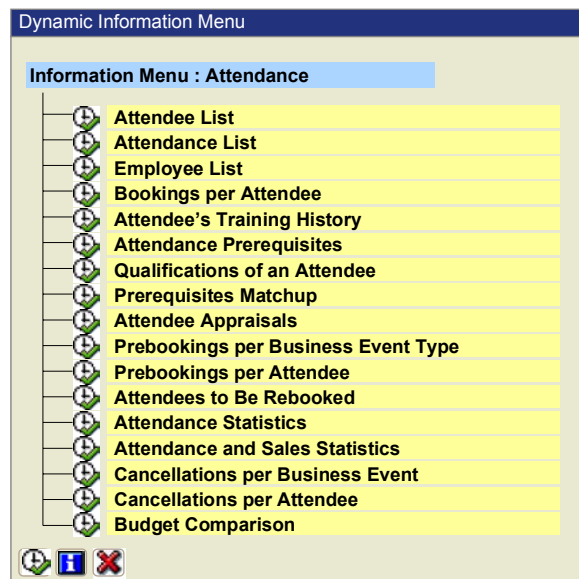
Integration


You access attendance reports from the *dynamic information menu* under *Attendance*, where they are displayed in a dialog box as illustrated below.

You can find the same reports under *Information System* → *Reports* → *Resources*.


Features


The following reports are available:



You can call up documentation for each of these reports simply by selecting a report in the list and clicking .


Reports for Attendance

Click  to directly access the simplified selection screen of the pre-report (if you have set this option under *user-specific settings*. See also [Switching the Selection Screen On and Off \[Page 25\]](#)). You can access a detailed explanation of the report under *Help* → *Application Help*.

If you want to access the main report with its more detailed selection screen, select the option *Standard selection screen* and choose . As a rule, it is not necessary to go to the main report.

Activities

Execute the report of your choice by choosing  and call a detailed description of the report using the *Help* function.

Set the required selection parameters and choose  again. A list screen appears with the results of the report you selected.

Attendee List (Report RHTEILN0)

Attendee List (Report RHTEILN0)

Use

This report creates a list of internal and external attendees of business events.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.


Normal / essential / waiting-list bookings

You can specify whether you want reporting done for attendees with normal, essential, or waiting list priority bookings.


Business event location

If you enter a valid location, the report only displays resource data at the specified location. No input is interpreted as all locations.

Standard selection screen (only pre-report RHXTEILN)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHTEILN0 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Attendee name
- Organizational unit or company (for external attendees)
- Booking priority (essential, normal, or waiting list)
- Booking date
- Cost center debited
- Attendance price
- Business event dates
- Number of bookings received for event date

Attendee List (Report RHTEILN0)

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

You can execute the following functions from the list screen:



- Display and maintain business event prices



If you want to use this function, the value maintained for the SEMIN CCOST switch in Customizing for *Training and Event Management* under *Day-to-Day Activities* - >Booking: *Fee Handling* must be = 1.

- Display and edit any notes that have been created for attendance bookings, and create new notes.
- Generate an [attendance list \[Page 259\]](#)

Activities

4. Set the required options on the selection screen.
5. Choose  to start the report.
6. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendance List (Report RHXTEILA)

Attendance List (Report RHXTEILA)

Use

This report generates a list of attendees of a business event with a column for signatures. You can use the signed list to check who actually attended an event and also to decide who is to receive attendance confirmation notifications.

Features


Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.


Standard selection screen (only pre-report RHXTEILA)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHTEILN0 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .



If you want to start the *Attendance List* report from the selection screen of the main report, you have to select the option *Format as attendance list* before you choose .

Output

The list output contains attendees' names, organizational assignment data, and a column for signatures.




- Attendees on the waiting list are not included in the list.
- Object IDs are not displayed.
- When you execute a report, you directly access the selection screen of its pre-report.

You can execute the following functions from the list screen:

- Download the attendance list into Microsoft WinWord.
- Sort attendees' surnames alphabetically.
- Sort attendees alphabetically by organizational assignment.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.
3. Sort attendees as required.
4. Download the list if required.
5. Print the list.

Employee List (Report RHEMPL00)

Employee List (Report RHEMPL00)

Use

This report generates a list of employees of an internal or an external organizational structure. An internal organizational structure refers to employees of an organizational unit, while an external one refers to the object types *company*, *customer*, or *interested party*.

This report is useful when you are replacing attendees of N.N. (unnamed) bookings of a company. N.N. bookings can only be replaced by named attendees.

Features

Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.


Indirect employees too

If you select this indicator, the report displays employees in subordinate organizational units too.

Standard selection screen (only pre-report RHXFIRMA)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHEMPL00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .


Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:


- Organizational assignment
- Employee name
- Employee abbreviation

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

7. Set the required options on the selection screen.
8. Choose  to start the report.

Employee List (Report RHEMPL00)

9. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Bookings per Attendee (Report RHBUCH00)

Bookings per Attendee (Report RHBUCH00)

Use

This report generates a list of business events for which an internal or external attendee (group or individual) is booked in a given period.

Integration

You can also start this report from the *Manager's Desktop* component (PPMDT). You access it in the *Employee* area under *Booking with History* (reports for training and education).

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Business event types

If you specify a business event type, the report lists all bookings of an attendee for events of the type specified.


With employee bookings

If you select this indicator, the report displays bookings of the individual attendees in a group booking (attendee types *organizational unit*, *company*, *customer*, or *interested party*).


Without employee bookings

If you select this indicator, the report displays the total number of bookings for group attendees, not broken down by individual employee.

Standard selection screen (only pre-report RHXBUCH0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHBUCH00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your selection specifications:

- Attendee name
- Organizational unit or company (for external attendees)

Bookings per Attendee (Report RHBUCH00)



- Booking priority (essential, normal, or waiting list)
- Booking date
- Attendance fee
- Business event

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

You can execute the following functions from the list screen:

- Display and edit any notes that have been created for attendance bookings.
- You can maintain attendance fee data
- You can cancel attendance bookings

Activities

10. Set the required options on the selection screen.
11. Choose  to start the report.
12. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendee's Training History (Report RHTHIST0)

Attendee's Training History (Report RHTHIST0)

Use

This report generates a training history for internal or external attendees. A training history is a list of all the training and education events attended by an attendee or for which an attendee is booked.

Integration

You can also start this report from the *Manager's Desktop* component (PPMDT). You access it in the *Employee* area under *Booking with History* (reports for training and education).

Features


Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.

Standard selection screen (only pre-report RHXTHIST)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHTHIST0 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:



- Name of business event types attended
- Name of business events attended
- Business event dates
- Business event prices
- Individual prices per person
- Training and education costs per attendee

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

13. Set the required options on the selection screen.

Attendee's Training History (Report RTHIST0)

14. Choose  to start the report.
15. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendance Prerequisites (Report RHKVOR00)

Attendance Prerequisites (Report RHKVOR00)

Use

This report generates a list of the prerequisites required for events of one or more event types in a give period.

Attendance prerequisites can be:

- Previous attendance at events of a specific type
- Qualifications such as specific skills or knowledge in a certain area (languages, word processing, or R/3 application)

Features


Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.

Standard selection screen (only pre-report RHXKVOR0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKVOR00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:



- Prerequisite qualifications
- Alternative qualifications (where available)
- Validity period of qualifications
- Prerequisite event types
- Validity period of event types

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

16. Set the required options on the selection screen.

Attendance Prerequisites (Report RHKVOR00)

17. Choose  to start the report.
18. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Qualifications of an Attendee (Report RHQALIF0)

Qualifications of an Attendee (Report RHQALIF0)

Use

This report generates a list of an attendee's qualifications.

By qualifications, we mean:

- Previous attendance at events of a specific type
- Qualifications and skills such as language skills or PC skills.

Features


Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.

Standard selection screen (only pre-report RHXQALIF)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHQALIF0 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list that contains the following information:


- The types of events attended
- Valid qualifications and their depreciation meter data
- Expired qualifications and their depreciation meters (display *dimmed*)



The list only displays event types of events that have taken place up to the key date specified for which the attendee had a booking with *normal* or *essential* priority. Waiting list bookings are not displayed in the list.

If the attendee has the same qualification multiple times (by attending an event several times), the report displays the most recent of these only.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.

Prerequisites Matchup (Report RHQANF00)

Prerequisites Matchup (Report RHQANF00)

Use

You can use this report to compare the prerequisites for event attendance with the actual qualifications of an attendee.



By qualifications, we mean:

- Attendance at events of a specified event type.
- Qualifications and skills such as language skills or PC skills.

Features


Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.

Standard selection screen (only pre-report RHXQANF0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHQANF00 before it is executed.





On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output


The report generates a list of prerequisites in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event type
- Attendee name
- Prerequisite (qualification or business event type)
- Name of prerequisite
- *Legend:* The following color-coding is used to indicate missing or expired qualifications of an attendee:

: Attendee fulfills the prerequisites in full.

: Attendee has the prerequisite qualification but it is no longer valid. In other words, the validity date of the attendee's event attendance lies before the allowed validity date.



Prerequisites Matchup (Report RHQANF00)

: Attendee does not have the required qualifications.

To display an explanation of the different colors, click on the traffic light (see above).

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.
3. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendee Appraisals (Report RHXEVALP)

Attendee Appraisals (Report RHXEVALP)

Use

This report generates a list of appraisals created for attendees of business events. You can also request the report to display attendees that have not yet been appraised.

See also:

[Appraisals \[Page 233\]](#)

Features

If there are multiple appraisal models for the [form of appraisal \[Ext.\]](#) *attendee appraisal*, you can select an [appraisal model \[Ext.\]](#) for the report. If you want to select an appraisal model that is not assigned to the form of appraisal, choose *Further appraisal models*.

You can select one or more [appraisal elements \[Ext.\]](#) for the appraisal model by choosing *Further selection criteria*. (If you select more than one appraisal element, there is a logical AND link between them.) You can assign a valuation to each appraisal element.

In this way, the report only selects attendees that have a pre-defined appraisal element valuation (for example, attendees that have the valuation 2 = *good* for the appraisal element *specialist knowledge*).



If you chose *Further selection criteria*, then in the dialog box *Catalog: Display Appraisal Model*, you must select appraisal elements for the same appraisal models that you set under *Appraisal Model* on the selection screen. Otherwise, the report will not function correctly.

Selection

You can set parameters to determine the data output by the report.

Period appraised

You can specify any period for the reporting.

Period created

You can specify the period when the appraisal was created.

Appraiser:

Since you are reporting on attendee appraisals here, the *business event* is selected by default. . Enter the business event(s) whose attendee appraisals you want included in the report.

Appraisee

Enter the attendee type(s) and the relevant attendee(s) to be included in the report.



Depending on what data you are reporting on, specify either *Appraiser* or *Appraisee*. If you are interested in all of the attendee appraisals of a business event, enter only the business event. On the other hand, if you are interested in the appraisals made

Attendee Appraisals (Report RHXEVALP)

of a certain attendee for all business events in a given period, specify the attendee only.

AND/OR

This parameter links the entries made for *appraiser* and *appraisee*. These entries are only significant if you have specified both *appraiser* and *appraisee*.

. The parameters let you define certain constellations for the search for appraisers and appraisees.

How the link affects selection:

- Appraiser A **and** appraisee B
 - All appraisals in which A is the appraiser and B the appraisee
- Appraiser A **or** appraisee B
 - All appraisals in which A is the appraiser
 - All appraisals in which B is the appraisee

Without appraisal/Display existing

If you select this indicator, the report only considers attendees of events that have not yet been appraised.

Do not select this indicator if you want to see existing appraisals.

If you select both of these indicators, the report considers both existing appraisals and attendees not yet appraised.

Appraisal status

You can specify an appraisal status for the report:

Individual/Overall/Subappraisals

Here you can select one or both [appraisal types \[Ext.\]](#).

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Appraiser (business event)
- Appraisee (attendee)
- Appraisal
- Status of appraisal
- Appraisal type

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).



You can execute the following functions from the list screen:

- Create average valuations
- Display the ranking

Attendee Appraisals (Report RHXEVALP)

- Compare appraisals
- Display, change, create, delete, rename appraisals and reset appraisal status to *in process*

Activities

4. Set the required options on the selection screen.
5. Choose  to start the report.
6. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Prebookings per Business Event Type (Report RHVORM00)

Use

This report generates a list of all of the prebookings received for one or more business event types in a given period. You can use the report as a means of determining the demand that exists for a business event type.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.


Location

If you specify a valid location, the report only lists prebookings for events held at the location specified. No input is interpreted as all locations.


Language

If you specify a valid language, the report only lists prebookings for events held in the specified language.

Standard selection screen (only pre-report RHXVORM0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHVORM00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Attendee name
- Organizational assignment
- Business event location
- Business event language
- Prebook period
- Sum total of prebookings



Prebookings per Business Event Type (Report RHVORM00)

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

You can execute the following functions from the list screen:

- Display and edit any notes that have been created for attendance bookings.
- Change prebookings
- Delete prebookings

Activities

19. Set the required options on the selection screen.
20. Choose  to start the report.
21. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Prebookings per Attendee (Report RHPREBO0)

Use

This report generates a list of prebookings and the expected costs per attendee received for all business event types in a given period. Expected costs are derived from the values stored with the *Prices* infotype as internal or external prices depending on the attendee type.

Integration

You can also start this report from the *Manager's Desktop* component (PPMDT). You access it in the area *Employees* under *Attendance Prebookings* (reports for training and education).

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Location

If you specify a valid location, the report only lists prebookings for events held at the location specified. No input is interpreted as all locations.

Language

If you specify a valid language, the report only lists prebookings for events held in the specified language.


With employee cancellations

If you select this indicator, the report displays the bookings of the named attendees in a group booking (Attendee types *organizational unit*, *company*, *customer*, or *interested party*).


Without employee cancellations

If you select this indicator, the report displays the total number of bookings for group attendees, not broken down by individual employee.

Standard selection screen (only pre-report RHXVORM1)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHPREBO0 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Prebookings per Attendee (Report RHPREBO0)**Output**

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Attendee name
- Business event type
- Business event location
- Business event language
- Prebooking date
- Sum total of prebookings

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).


You can execute the following functions from the list screen:

- Display and edit any notes that have been created for attendance bookings.
- Change prebookings
- Delete prebookings

Activities

22. Set the required options on the selection screen.

23. Choose  to start the report.

24. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendees to Be Rebooked (Report RHUMBU00)

Use

This report generates a list of attendees that still have to be rebooked. That is, attendees that did not receive a place on the business event when it was firmly booked or canceled. These attendees are on the waiting list of the business event.

See also:

[Firmly Book Business Event \[Page 226\]](#)

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period


You can specify any period for the reporting.

Language


If you specify a valid language, the report only lists rebookings for events held in the specified language.

No input is interpreted as all events.

Standard selection screen (only pre-report RHXUMBU0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHUMBU00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .



Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event name
- Business event dates
- Business event language
- Indicator for locked events
- Attendee name

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Attendees to Be Rebooked (Report RHUMBU00)**Activities**

25. Set the required options on the selection screen.
26. Choose  to start the report.
27. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendance Statistics (Report RHKURS20)

Use

This report generates attendance statistics of all business events for one or more event types in a given period.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Language

If you enter a valid language key, the report only displays statistics for events held in the specified language.

Catalog

If you select this indicator, the report only considers events for which bookings may still be made.

Locked only

If you select this indicator, the report only displays statistics for events that are locked.

With historical records only

If you select this indicator, the report only displays statistics for events that have a historical record flag appended.

Business event location

If you select this indicator and enter a valid location, the report only displays statistics for event dates held at the specified location.

Status

If you enter a status, the report only considers bookings for events in the status specified.



You can use the status option as a reminder to firmly book events. If you enter status **2** here (*planned*), the report lists events still in planned status that have to be either firmly booked or canceled.

On the list screen, you then have the option of choosing the *firmly book* or *cancel* functions for events in the list (report RHFIXK00).

External only

If you select this indicator, the report only displays statistics for external events.


Canceled only

If you select this indicator, the report only displays statistics for canceled events.


Attendance Statistics (Report RHKURS20)

It is possible to select multiple options simultaneously provided that you do not select options that logically contradict each other. For example, you cannot simultaneously select *Catalog* and *Canceled only* or *Locked only* since you cannot make bookings for events in the latter two statuses. The combination *Locked only* and *Canceled only* is equally impossible.

Standard selection screen (only pre-report RHXKURS2)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKURS20 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event name
- Business Event Dates
- Business event language
- Sum total of attendees
- Indicator for locked (L), canceled (D for deleted) and historically recorded (H) events

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).


You can execute the following functions from the list screen:

- Display the attendee list
- Firmly book or cancel business events
- Follow up business events

Activities

28. Set the required options on the selection screen.

29. Choose  to start the report.

30. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Attendance and Sales Statistics (Report RHKURS30)

Use

This report generates statistics of attendee numbers and business event sales (sales = number of attendees multiplied by the price) for events of one or more event types or groups in a given period.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Organizer data

If you enter a valid organizer and organizer type, the report only displays statistics for events organized by the organizer specified.


Business event location

If you select this indicator and enter a valid location, the report only displays statistics for events held at the specified location.


Currency

If you specify a valid currency, sales figures are displayed in this currency if the pertinent exchange rate has been maintained in table TCURC.

Standard selection screen (only pre-report RHXKURS3)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKURS30 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:



- Business event name
- Business Event Dates
- Total sales per event type
- Billed sales
- Internally allocated sales

Attendance and Sales Statistics (Report RHKURS30)

- Sum total of attendees

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

31. Set the required options on the selection screen.
32. Choose  to start the report.
33. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Cancellations per Business Event (Report RHSTOR00)

Use

This report generates a list of business events that have been canceled by attendees for the business event groups, types and/or business events you specify in the selection period. Any cancellation fees that were levied are also displayed in the list.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.


Cancellation reason (only main report RHSTOR00)

If you can select a cancellation reason here, the report only considers business events that were canceled for the selected reason.


Currency

If you specify a valid currency, cancellation fees are displayed in this currency.

Standard selection screen (only pre-report RHXSTOR0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHSTOR00 before it is executed.



On the selection screen of the main report, you can select objects by cancellation reason, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event name
- Business event dates
- Status of business event (planned/firmly booked)
- Number of bookings canceled per business event
- Cancellation fees per business event
- Sum total of bookings canceled
- Sum total of cancellation fees

Cancellations per Business Event (Report RHSTOR00)

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).


You can execute the following functions from the list screen:

- Display and edit any notes that have been created for attendance bookings.
- Maintain cancellation fee data

Activities

34. Set the required options on the selection screen.

35. Choose  to start the report.

36. On the list screen that is output, change the list layout to display data that interests you. Do so by choosing .

Cancellations per Attendee (Report RHSTOR10)

Use

This report generates a list of cancellations for one or more attendees for a given selection period.

Integration

You can also start this report from the *Manager's Desktop* component (PPMDT). You access it in the area *Employee* under *Attendance Prebookings* (reports for training and education).

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.


Cancellation reason (only main report RHSTOR00)

If can select a cancellation reason here, the report only considers business events that were canceled for the selected reason.


Currency

If you specify a valid currency, cancellation fees are displayed in this currency.

Standard selection screen (only pre-report RHXSTOR1)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHSTOR10 before it is executed.



On the selection screen of the main report, you can select objects by cancellation reason, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Attendee name
- Organizational assignment
- Number of cancellations per attendee
- Sum total of cancellation fees per attendee
- Sum total of cancellation fees

Cancellations per Attendee (Report RHSTOR10)

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).


You can execute the following functions from the list screen:

- Display and edit any notes that have been created for attendance bookings.
- Maintain cancellation fee data

Activities

37. Set the required options on the selection screen.

38. Choose  to start the report.

39. On the list screen that is output, change the list layout to display data that interests you. Do so by choosing .

Budget Comparison (Report RHBUDG00)

Use

This report lets you compare the budget allocated to an organizational unit with the actual training and education costs accrued up to a certain key date in *Training and Event Management*.

The reporting period covers the current fiscal year up to the key date you specify.



Only budgets with the status *released* are included in the reporting.

Integration

You can also start this report from the *Manager's Desktop* component (PPMDT). You access it in the area *Employees* under the same name *Budget comparison* (reports for *training and education*).

Features

Selection

You can set parameters to determine the data output by the report.


Incl. organizational structure

If you select this indicator, the report also considers any underlying organizational units assigned to the object you enter and outputs the budgets and training costs of these as well.


Incl. cancellations

If you select this indicator, the report also considers the cancellation fees levied.

Standard selection screen (only pre-report RHXBUDG0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHBUDG00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report outputs a list that can contain any of the following data depending on what selection parameters you set:


- Reporting period
- Organizational unit name
- Budget totals

Budget Comparison (Report RHBUDG00)

- Actual costs

Activities

Set the required options on the selection screen.

Choose  to start the report.

Reports for Resources

Use

These reports give you access to a wide range of important data regarding resources in *Training and Event Management*. Generally speaking, the reports fall into two main categories:

- Reports that support the training administrator in the day-to-day business of *Training and Event Management* (for example, *Resources Not Yet Assigned per Resource Type*).
- Reports that are requested purely for information purposes (for example, *Graphical Resource Reservation*).

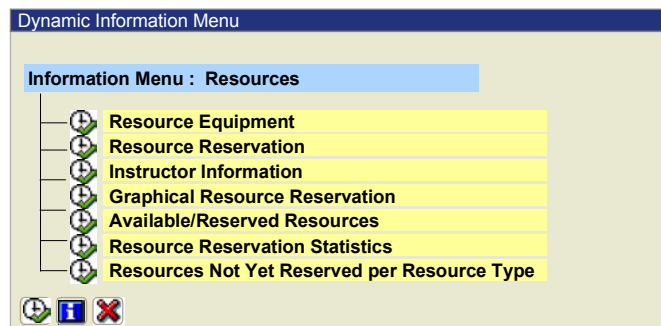
Integration


You access resource reports from the *dynamic information menu* under *Resources*, where they are displayed for selection in a dialog box as illustrated below.


You can find the same reports under *Info system* → *Reports* → *Resources*.


Features

The following reports are available for resources:




You can call up documentation for each of these reports simply by selecting a report in the list and clicking .

Click  to directly access the simplified selection screen of the pre-report (if you have set this option under *user-specific settings*. See also [Switching the Selection Screen On and Off \[Page 25\]](#)). You can access a detailed explanation of the report under *Help* → *Application Help*.

If you want to access the main report with its more detailed selection screen, select the option *Standard selection screen* and choose . As a rule, it is not necessary to go to the main report.

Activities

Execute the report of your choice by choosing  and call a detailed description of the report using the *Help* function.

Set the required selection parameters and choose  again. A list screen appears with the results of the report you selected.

Resource Equipment (Report RHRESA00)

Use

This report displays the resources with which another resource (usually a room) is equipped in a given period. The report lists objects of type R (resource type) which are related with objects of type G (resource).

Room Reservation Management can use this report, for instance, to obtain an overview of what equipment (object type R) is available in the training rooms (object type G).

Features


Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.

Standard selection screen (only pre-report RHXRESA0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHRESA00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .



Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Resource
- Equipment
- Quantity of equipment
- Equipment period

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

40. Set the required options on the selection screen.
41. Choose  to start the report.
42. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Resource Reservation (Report RHRBEL00)

Use

This report generates a tabular list of resource reservations for a specified resource type and displays the business events that have reserved them.

You can display reservations in daily, weekly, or hourly period split as required.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Period split

The table displays resource reservation times according to the period split you select (hourly, daily, or weekly).

Firmly booked events

If you select this indicator, the report displays resource reservations for events in firmly booked status.

Planned events

If you select this indicator, the report displays resource reservations for events in planned status.

Business event type

If you enter a business event type here, the report only displays resource reservations for events of the specified type.

Location

If you select this indicator and enter a valid location, the report only displays resource reservations at the specified location.

Minimum reservation per resource

If you specify a number here, the report only displays resources that have been reserved at least *N* times.

If you enter zero (0), the report displays resources that are not reserved as well.

Display IDs

If you select this indicator, the report displays object IDs.

Display days off (with daily period split)

If you select this indicator together with the parameter *Day*, the report displays days off.

Display one reservation per resource only

If you select this indicator, the report displays one reservation per resource only.

Resource Reservation (Report RHRBEL00)**Output**

The table generated by the report displays the following information:

- Resource type name




If you start the report with a resource, the resource type is NOT displayed.

- Selection period
- Weekday/date/time (depending on your period split specifications)
- Resource name
- Business event short name

The list screen contains the following *functions*:

- Change the period split from the table.
- Choose *Edit* to switch between display of single or multiple reservations of a resource.
- Display the list of attendees of an event by selecting a business event in the list and choosing *Attendee list*.
- Display the time schedule of an event by selecting a business event in the list and choosing *Schedule*.
- Call a graphical display of resources and their reservations by choosing *Graphic*.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.

Instructor Information (Report RHSSREF0)

Use

This report displays the instructor activities of individual persons in *Training and Event Management*.

Integration

The report has a pre-report *Instructor Function* (RHSSREF) with a simplified selection screen.

Features

Selection

You can set parameters to determine the data output by the report.

Under *Objects* you can specify the object type and instructors for whom you want to request the report.

In addition, under *Reporting period* you can specify the exact time period for the reporting.



Output

The report generates a list in SAP List Viewer(ALV) Grid Control that can contain any of the following information (depending on your layout specifications):

- Reporting period
- Resource (instructor's name)
- Business event ID
- Start date of business event
- End date of business event
- Start time on the first day
- End time on the last day
- Number of event days
- Business event duration per day in hours
- Total business event duration in hours

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

43. On the selection screen, you enter the instructor(s) (object type and object name) and the reporting period.
44. Choose  to start the report.
45. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Graphical Resource Reservation (Report RHRBEL10)

Use

This report generates a graphical display of resource reservations for a selected resource type in the selection period. The graphic also displays the business events for which resources have been reserved.

You can display reservations in daily, weekly, or hourly period split as required.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Period split

The table displays resource reservation times according to the period split you select (hourly, daily, or weekly).

Firmly booked events

If you select this indicator, the report displays resource reservations for events in firmly booked status.


Planned events

If you select this indicator, the report displays resource reservations for events in planned status.


Location

If you select this indicator and enter a valid location, the report only displays resource reservations at the specified location.

Standard selection screen (only pre-report RHXRBEL1)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHRBEL10 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The **graphic** contains the following information:

- Resource type name
- Selection period
- Date/time (depending on your period split specifications)

Graphical Resource Reservation (Report RHRBEL10)

- Resource name
- Business event short name


You can execute the following functions from the graphic:

- Display attendee list of an event by selecting the event and choosing *Attendee list*.
- Display the time schedule of an event by selecting the event and choosing *Business event schedule*.
- Display the list of resources reserved for an event by selecting the event and choosing *Resource list*.
- Display the resource list as a table.



If you double click a resource or a business event, you can display the pertinent data screen.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.

Available/Reserved Resources (Report RHRFRE00)

Use

This report generates a list of available and reserved resources of a selected resource type per day in the selection period.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Business event location

If you enter a valid location, the report only displays resource data at the specified location.

No input is interpreted as all locations.

Available resources

If you select this indicator, the report only displays resources that are available per day in the selection period.

Reserved resources

If you select this indicator, the report only displays resources that are reserved per day in the selection period.

Output


The list output contains the following information:

- Resource type name
- Selection period
- Resource name

You can execute the following functions from the list screen:

- Display resource reservations of a resource by selecting the resource and choosing the relevant function.
- Display resource reservations on a given day by selecting the resource and choosing the relevant function. The report displays the exact times on that day for which the resource has been reserved.
- Switch between the display of available and reserved resources on the list screen.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.

Resource Reservation Statistics (Report RHRESO00)

Use

This report displays the reservation of resources (such as instructors) for business events in the selection period. The report output displays a list of resources, their reservations, and reservation times.

Integration

You can also start this report from the *Manager's Desktop* component (PPMDT). You access it in the area *Employees* under *Instructor function* (reports for training and education).

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period


You can specify any period for the reporting.

Business event location


If you enter a valid location, the report only displays resource data at the specified location.

No input is interpreted as all locations.

Standard selection screen (only pre-report RHXRESO0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHRESO00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .



Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Resource name
- Sum total of reservation days per business event type
- Sum total of reservation hours per business event type
- Reservation date per business event
- Business event name

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Resource Reservation Statistics (Report RHRESO00)**Activities**

46. Set the required options on the selection screen.
47. Choose  to start the report.
48. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Resources Not Yet Assigned per Resource Type (Report RHORES00)

Use

This report generates a list of business events that still require a selected resource type.

Features

Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.


Business event location

If you enter a valid location, the report only displays resource data at the specified location. No input is interpreted as all locations.

Standard selection screen (only pre-report RHXORES2)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHORES00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .



Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Resource type name
- Selection period
- Name of the business event that requires the resource type.
- Reservation period for the business event
- Status of business event (planned/firmly booked)
- Number of reservations required
- Times of reservation.

You can find information on the features and display options of the List Viewer in the documentation of the [SAP List Viewer \(ALV\): Grid Control \[Ext.\]](#).

Resources Not Yet Assigned per Resource Type (Report RHORES00)**Activities**

49. Set the required options on the selection screen.
50. Choose  to start the report.
51. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Reports for Business Events

Use

These reports give you access to a wide range of important data regarding business events. Generally speaking, the reports fall into three main categories:

- Reports that trigger activities or business processes (*Material Requirements per Business Event*) or that generate objects (*Business Event Brochure*)
- Reports that support the training administrator in the day-to-day business of *Training and Event Management* (e.g. *Resources Not Yet Assigned per Business Event*).
- Reports that are requested purely for information or statistical purposes (*Business Event Dates*).

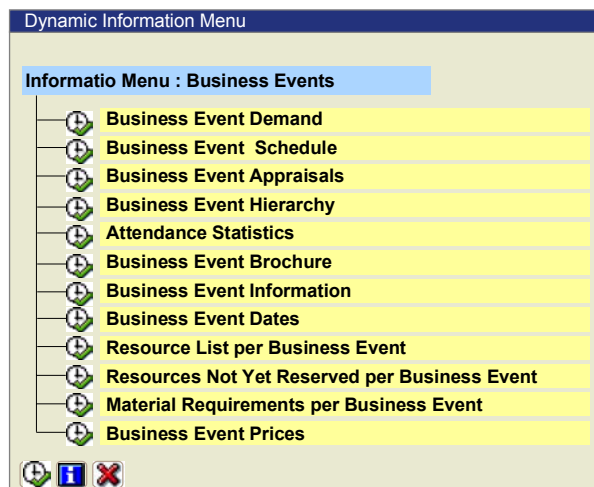
Integration


You access business event reports from the *dynamic information menu* under *Business events*, where they are displayed for selection in a dialog box as illustrated below.


You can find the same reports under *Info system* → *Reports* → *Business Events*.


Features

The following reports are available for business events:




You can call up documentation for each of these reports simply by selecting a report in the list and clicking .

Click  to directly access the simplified selection screen of the pre-report (if you have set this option under *user-specific settings*. See also [Switching the Selection Screen On and Off \[Page 25\]](#)). You can access a detailed explanation of the report under *Help* → *Application Help*.

If you want to access the main report with its more detailed selection screen, select the option *Standard selection screen* and choose . As a rule, it is not necessary to go to the main report.

Reports for Business Events**Activities**

Execute the report of your choice by choosing  and call a detailed description of the report using the *Help* function.

Set the required selection parameters and choose  again. A list screen appears with the results of the report you selected.

Business Event Demand (Report RHKBED00)

Use

This report generates a list displaying the demand that exists for business event of a given type. You can run the report to determine demand for a planning year, or for individual quarters of a year.

You can set parameters to determine demand by language and by location separately.

The report can also display details of whether the demand is covered or not by the number of events scheduled.

Features

Selection

You can set parameters to determine the data output by the report.

Annual demand

Enter the calendar year for which you require demand statistics.

1st quarter, 2nd quarter, 3rd quarter, 4th quarter

The report considers any quarter or quarters you select.

Business event location

If you select this indicator and enter a valid location, the report only determines demand for events at the specified location. No input is interpreted as all locations.

Language

If you enter a valid language key, the report only displays statistics for events held in the specified language. No input is interpreted as all languages.

Table Control

If you select this indicator, the list is output in Table Control. On the list screen, you can switch between Table Control and ABAP list format.


Split by language

If you select this indicator, demand per business event type is split by language. You can use the function keys to switch between detailed display and summarized view.


Split by location

If you select this indicator, demand per business event type is split by location. You can use the function keys to switch between detailed display and summarized view.

Standard selection screen (only pre-report RHXKBED0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKBED00 before it is executed.

Business Event Demand (Report RHKBED00)

On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The list output contains the following information:

- Business event type name
- Business event location
- Business event language
- Outstanding demand by quarter
- Covered demand by quarter
- Sum total of outstanding demand per business event type
- Sum total of covered demand per business event type




If events for which no demand has been determined have been scheduled for a quarter, information on these event dates is not included in the list.

You can execute the following functions from the list screen:

- Display existing event dates for event types.
- Plan event dates.
- Create demand statistics or change existing demand figures.
- Split the display by business event language.
- Split the display by business event location.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.

Business Event Schedule (Report RHABLAUF)

Use

This report displays the time schedule of a business event.

If the *Schedule* infotype (1035) has not been stored for the event, the report terminates with a message to this effect.

Features

Selection

Select the event whose schedule you want to display by entering one of the following:

Business event ID

Enter the numerical key or ID of the event.

Search string business event

You can initiate a search for the relevant event by entering a search string or term.



If you enter a wild card (*), the system displays all existing events.

If you enter *RP* for example, the system finds all events that have the string *RP* in their long or short name.

Output

The report generates a list in ALV (ABAP List Viewer) Grid Control that can contain any of the following information (depending on your selection specifications):

- Business event name
- Business Event Dates
- Business event date
- Day number
- Current date
- Weekday
- Start and end time
- Indicator for day off

You can find information on the features and display options of the List Viewer in the documentation of the [ABAP List Viewer \(ALV\): Grid Control \[Ext.\]](#).

Activities

Set the required options on the selection screen.

Choose *Execute*.

Business Event Schedule (Report RHABLAUF)

On the list screen output, change the display options as required.

Business Event Appraisals (Report RHXEVALV)

Use

This report generates a list of appraisals created by attendees of business events. You can also request the report to display events that have not yet been appraised.

See also:

[Appraisals \[Page 233\]](#)

Features

If there are multiple appraisal models for the [form of appraisal \[Ext.\]](#) *business event appraisal*, you can select an [appraisal model \[Ext.\]](#) for the report. If you want to select an appraisal model that is not assigned to the form of appraisal, choose *Further appraisal models*.

You can select one or more [appraisal elements \[Ext.\]](#) for the appraisal model by choosing *Further selection criteria*. (If you select more than one appraisal element, there is a logical AND link between them.) You can assign a valuation to each appraisal element.

In this way, the report only selects business events that have a pre-defined appraisal element valuation (for example, business events where the appraisal element *training materials* received the valuation *Contents 1 = very good*).



If you chose *Further selection criteria*, then in the dialog box *Catalog: Display Appraisal Model*, you must select appraisal elements for the same appraisal models that you set under *Appraisal Model* on the selection screen. Otherwise, the report will not function correctly.

Selection

You can set parameters to determine the data output by the report.

Period appraised

You can specify any period for the reporting.

Period created

You can specify the period when the appraisal was created.

Appraiser:

Enter the attendee type(s) and the relevant attendee(s) that created the appraisals.

Appraisee

Since you are interested in a business event appraisal (appraisal of an event by an attendee), the *business event* option is selected by default. Enter the business event(s) whose appraisals you want included in the report.



Depending on what data you are reporting on, specify either *Appraiser* or *Appraisee*. On the other hand, if you are interested in the appraisals made by a certain attendee

Business Event Appraisals (Report RHXEVALV)

of all business events in a given period, specify the attendee only. On the other hand, if you are interested in appraisals of a specific event created by its attendees, enter only the business event.

AND/OR

This parameter links the entries made for *appraiser* and *appraisee*. These entries are only significant if you have specified both *appraiser* and *appraisee*.

. The parameters let you define certain constellations for the search for appraisers and appraisees.

How the link affects selection:

- Appraiser A **and** appraisee B
 - All appraisals in which A is the appraiser and B the appraisee
- Appraiser A **or** appraisee B
 - All appraisals in which A is the appraiser
 - All appraisals in which B is the appraisee

Without appraisal/Display existing

If you select this indicator, the report only considers events that have not yet been appraised.

Do not select this indicator if you want to see existing appraisals.

If you select both of these indicators, the report considers both existing appraisals and business events not yet appraised.

Appraisal status

You can specify an appraisal status for the report:

Individual/Overall/Subappraisals

Here you can select one or both [appraisal types \[Ext.\]](#).

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Appraiser (attendee)
- Appraisee (business event)
- Appraisal
- Status of appraisal
- Appraisal type

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).



You can execute the following functions from the list screen:

- Create average valuations
- Display the ranking

Business Event Appraisals (Report RHXEVALV)

- Compare appraisals
- Display, change, create, delete, rename appraisals and reset appraisal status to *in process*

Activities

52. Set the required options on the selection screen.
53. Choose  to start the report.
54. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Business Event Hierarchy (Report RHXCGRP0)

Use

This report displays the business event hierarchy underlying a selected event group or event type.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Business event type

If you select this indicator and enter an event type (ID or a search string), the report displays the event type and all underlying event dates that have been scheduled and any existing attendee lists.

Business event group

If you select this indicator and enter an event group (ID or a search string), the report displays the event group, all underlying event groups, event types, event dates scheduled and any existing attendee lists.

Standard selection screen (only pre-report RHXCGRP0)

Output

The following information is output as a rule:


- Selection period
- Business event language
- Business event group name
- Business event name (event type)
- Business event dates
- Business event status
- Attendee lists
- Bookings for the events
- Booking priorities
- Date of booking

You can access the following display variants and functions from the hierarchy display:

- Display the hierarchy in graphical format using *Structural graphics*.
- Create a brochure containing the event groups and types in the hierarchy by choosing *Brochure*.

Activities

Set the required options on the selection screen.

Choose  to start the report.

Attendance Statistics (Report RHKURS20)

Attendance Statistics (Report RHKURS20)

Use

This report generates attendance statistics of all business events for one or more event types in a given period.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Language

If you enter a valid language key, the report only displays statistics for events held in the specified language.

Catalog

If you select this indicator, the report only considers events for which bookings may still be made.

Locked only

If you select this indicator, the report only displays statistics for events that are locked.

With historical records only

If you select this indicator, the report only displays statistics for events that have a historical record flag appended.

Business event location

If you select this indicator and enter a valid location, the report only displays statistics for event dates held at the specified location.

Status

If you enter a status, the report only considers bookings for events in the status specified.



You can use the status option as a reminder to firmly book events. If you enter status **2** here (*planned*), the report lists events still in planned status that have to be either firmly booked or canceled.

On the list screen, you then have the option of choosing the *firmly book* or *cancel* functions for events in the list (report RHFIXK00).

External only

If you select this indicator, the report only displays statistics for external events.

Canceled only


If you select this indicator, the report only displays statistics for canceled events.

Attendance Statistics (Report RHKURS20)




It is possible to select multiple options simultaneously provided that you do not select options that logically contradict each other. For example, you cannot simultaneously select *Catalog* and *Canceled only* or *Locked only* since you cannot make bookings for events in the latter two statuses. The combination *Locked only* and *Canceled only* is equally impossible.

Standard selection screen (only pre-report RHXKURS2)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKURS20 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:



- Business event name
- Business Event Dates
- Business event language
- Sum total of attendees
- Indicator for locked (L), canceled (D for deleted) and historically recorded (H) events

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

You can execute the following functions from the list screen:

- Display the attendee list
- Firmly book or cancel business events
- Follow up business events

Activities

55. Set the required options on the selection screen.
56. Choose  to start the report.
57. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Business Event Brochure (Report RHKBRO00)

Use

This report creates a brochure containing selected business event types, groups, and where relevant, business event dates. The business event brochure lists details of the events currently offered in your catalog.

The following information on event groups and event types can be printed in the brochure:

- Extended business event type text (Infotype 1002 Subtype 0004)
- Business event duration in days (Infotype 1042 Subtype 0001)
- Prerequisites (relationship A029 *presupposes*)
- Follow-up event (relationship B029 *is presupposed by*)
- Business event contents (Infotype 1002 Subtype 0002)
- Objectives (relationship A028 *imparts*)
- Target group (relationship A033 *is planned for*)
- Notes (Infotype 1002 Subtype 0003)
- Business event information: External or internal price (from infotype 1021) and organizer (relationship A036 *is organized by*)
- Dates and event location: Business event date (relationship A020 *is a specialization of*) and business event location (relationship A024 *takes place in*)



You can maintain this information for the event type in the master data catalog and for event dates and event location in the dynamic *Business Event* menu.

Prerequisites

If you want to include certain event types only in the brochure, you must specify this when you create the event type. You do so in the *Business event type info* (1029) by setting the indicator for inclusion in the brochure.

You can also set this indicator at a later date by access object maintenance for the event type in the master data catalog.

Features

You can download the brochure into WinWord and create a table of contents.

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Language

Business Event Brochure (Report RHKBRO00)

If you specify a language, only event types are output in the brochure that are held in the language specified.

Selected event types only

If you select this indicator, the brochure will only feature the event types that are actually flagged for inclusion in the *Business event type info* (1029).

If you do not select this indicator, all of the event types you selected for the report will be output in the brochure.

Display dates

If you select this indicator, the brochure displays all of the event dates scheduled for the event types.

External price

If you select this indicator, you specify that the external price for attendance fees is listed in the brochure.

Internal price

If you select this indicator, you specify that the internal price for attendance fees is listed in the brochure.





You can only display one of these prices in the brochure.

Generate table of contents

If you select this indicator, the report automatically generates a table of contents in the brochure, that is, a list of event types with page numbers.

Extended formatting options

Choose  to access the *Business Event Brochure: Extended Formatting Options* dialog box where you can specify what information is included in the brochure for event types and event groups. Choose  to delete information that you do not want published in the brochure.

You can rename the box texts by overwriting the titles.


If you select the option *Frame*, you can specify that an empty frame is output for infotypes that have not been maintained for an event type. This feature also makes it easy to check and, where relevant, supply what information has not been stored for an event type. If you do not select this indicator, only information is output that has actually been maintained for an event type.

Choose  to save your formatting specifications for the brochure.




You can revoke your settings and return to the standard settings by choosing *Set default values*.

Standard selection screen (only pre-report RHXKBRO0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKBRO00 before it is executed.



Business Event Brochure (Report RHKBRO00)

On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

In the standard system, the following items of information can be included in the *brochure*:

For business event groups:

- Extended business event type text (Infotype 1002 Subtype 0004)
- Description (Infotype 1002 Subtype 0001)
- Business event contents (Infotype 1002 Subtype 0002)
- Notes (Infotype 1002 Subtype 0003)

For business event types:


- Extended business event type text (Infotype 1002 Subtype 0004)
- Business event duration in days (Infotype 1042 Subtype 0001)
- Prerequisites (A029)
- Follow-up events (B029)
- Business event contents (Infotype 1002 Subtype 0002)
- Objectives (A028)
- Target group (A033)
- Notes (Infotype 1002 Subtype 0003)
- Where required, other user-defined information (Infotype 1002 Subtype 9*** - customer name space)
- Business event dates (A020)
- Business event location (A024 for event date)
- Business event prices (Infotype 1021)
- Organizer (A036)

You can execute the following functions after the report has been executed:

- Download the brochure into WinWord for further editing
- Display and edit the data screen of a business event type
- You can, for example, maintain any missing infotypes for an event type that you identified by selecting the *Frame* indicator.
- Display event dates scheduled per event type.
- Refresh the brochure after you have made changes.
- Print the brochure.

Activities

Set the required options on the selection screen.

Choose  to start the report.

Business Event Information (RHSEMI60)

Use

This report lets you display detailed information stored for business event dates such as event location, instructor, room, telephone number of room, event owner, availability of places on the event, or duration of the event.

In addition to providing you with speedy access to a wide range of important information about an event, the report can also be used to help you determine what events still need to be firmly booked or followed up, or what events are currently locked and so on.

Features

Selection

You can set parameters to determine the data output by the report. In addition to specifying the events you want displayed and the selection period, you can specify multiple other attributes under *Output*.



The option *All* which is available for all parameters is selected by default so that you can run the report without making any specific selection yourself if required.

The following options are available for event dates:


- Only firmly booked / Only planned
- No historical record / Only hist. record
- Not canceled / Only canceled
- Not locked / only locked
- Only available / only reserved
- Only internal / Only external
- Not followed up / only followed up

Output


The report's list screen can contain the following information:



- Business event name
- The start and end date of the business event
- Business event language
- Business event location
- Building
- Room information (such as room number, telephone number)
- Booking information (such as free places or number of waiting list bookings)
- Business event duration

- Instructors

You can specify what data you want output in the list under .



When you choose this function, a dialog box appears with the columns that are hidden on the list screen in the right table, and the columns that are displayed in the left table.

By marking columns and moving the arrows, you can determine what columns are displayed. You can display your changes by choosing .

To save the layout, choose . You can call this layout as required by choosing .

You can find more information about display options on the list screen under [SAP List Viewer \(ALV\)\) Grid Control \[Ext.\]](#)

Activities

1. Select the event dates you want displayed by specifying one or more business event groups, types or event dates.
2. Enter the *reporting period*.
3. Under *Output* select one or more parameters.
4. Choose .
5. If required, choose  to change the layout to display other data that interests you.

Business Event Dates (Report RHKBRO10)

Business Event Dates (Report RHKBRO10)

Use

This report generates a list of event dates scheduled for selected event types in a given period.



Events that have been canceled, locked, followed-up, or historically recorded are not displayed.

If you enter an event group, the report displays all dates scheduled for all of the underlying event types.

Features

Selection

You can set parameters to determine the data output by the report.

Reporting period

You can specify any period for the reporting.

Location

If you select this indicator and enter a valid location, the report only displays event dates held at the specified location.

No input is interpreted as all locations.

Language

If you specify a valid language, the report only lists events held in the specified language.

No input is interpreted as all languages.


Selected event types only

This parameter is only relevant if you want to use the *Brochure* function for the list generated by the report, or if you want to print a list of event dates that are aimed at external attendees only.


The indicator lets you specify that only event types are included in the brochure that actually have the *inclusion in brochure* indicator set in the *Business Event Type Info* infotype (1029).

If you do not select this indicator, all of the event types you selected for the report will be output in the brochure.

Standard selection screen (only pre-report RHXKBRO1)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKBRO10 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event type name
- Selection period
- Number of event dates
- Business event dates
- Business event locations
- Business event languages

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).


You can execute the following *functions* from the list screen:

Display the attendee list of the business event.

Activities

58. Set the required options on the selection screen.

59. Choose  to start the report.

60. On the list screen that is output, change the list layout to display data that interests you. Do so by choosing .

Resource List per Business Event (Report RHERES00)

Resource List per Business Event (Report RHERES00)

Use

This report creates a list of required resources (rooms, instructors, and other resources such as training materials that are not managed in the Material Master) for all business events in the period specified.

Features

Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.


Location

If you select this indicator and enter a valid location, the report only considers event dates held at the specified location.

Standard selection screen (only pre-report RHXERES0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHERES00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output



The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event name
- Selection period
- Resource name
- Sum total of reservation days per business event
- Period of resource reservation in days
- Sum total of reservation time of resources in hours
- Period of resource reservation with times

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Resource List per Business Event (Report RHERES00)

Activities

61. Set the required options on the selection screen.
62. Choose  to start the report.
63. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Resources Not Yet Assigned per Business Event (Report RHXORES1)

Resources Not Yet Assigned per Business Event (Report RHXORES1)

Use

This report generates a list of the resource types that are still required per business event, in other words, resource types that have been flagged as *required* for events of a given event type.

Features

Selection

You can set parameters to determine the data output by the report.


Reporting period

You can specify any period for the reporting.


Location

If you enter a valid location, the report only displays data for events held at the specified location.

Standard selection screen (only pre-report RHXORES1)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHORES00 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output

The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:



- Business event name
- Selection period
- Name of required resource types
- Reservation period for resource types
- Number of reservations
- Times of reservation

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

64. Set the required options on the selection screen.

Resources Not Yet Assigned per Business Event (Report RHXORES1)

65. Choose  to start the report.
66. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

Material Requirements per Business Event (Report RHMARP00)

Material Requirements per Business Event (Report RHMARP00)

Use

This report lets you display what resources of the type *material* (from the material master) are required for business events. You can also use the report to trigger a material reservation for in-stock material or a purchase requisition for non-stock material if required.

If no material is required for a business event, a message to this effect is output.



This report evaluates the amount of material that is available using the assigned resource type. This information is stored for the resource type in the *Availability Indicators* infotype. This infotype specifies whether a material is required per attendee or per business event.

See also:

[Materials Procurement \[Page 106\]](#)

Features

Selection

You can set parameters to determine the data output by the report.

Business event selection


There are a number of ways to start the report:

- Enter one or more *business event groups*. The system finds all of the business events belonging to the specified group(s) and displays the material requirements.
- Enter one or more *business event types*. The system finds all of the business events belonging to the specified type(s) and their material requirements.
- Enter one or more *business events*.


Reporting period

You can specify any period for which you want to determine material requirements. The report only includes business events whose start date lies within the selection period.

Standard selection screen (only pre-report RHXMARP0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHMARP00 before it is executed.




On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Material Requirements per Business Event (Report RHMARP00)


Output



The report's *list screen* can contain the following information, depending on your layout specifications:

- Business event name
- Controlling area
- Cost center
- Start and end date of the business event
- Capacity of the business event (minimum, optimum, maximum)
- Bookings
- Material name
- Material number
- Requirement per business event
- Requirement per attendee
- Total requirements (requirements per attendee are multiplied by the number of attendees booked)
- Status of the reservation
- Reference document number for the material reservation (when it has been executed)
- Reference document number for the material order (when it has been executed)

You can specify what data you want output in the list under :

When you choose this function, a dialog box appears with the columns that are hidden on the list screen in the right table, and the columns that are displayed in the left table.

By marking columns and moving the arrows, you can determine what columns are displayed. You can display your changes by choosing .

To save the layout, choose . You can call this layout as required by choosing .

You can find more information about display options on the list screen under [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#)

On the list screen, you can trigger a material reservation or a purchase requisition for the materials displayed by choosing *Reserve Material*.

The following process flow takes place:


1. When you choose *Reserve Material*, a dialog box appears in which you can decide whether the required amount should be derived from the number of attendees booked or the optimum number capacity of the business event.
2. When you trigger the material order, an availability check is carried out for the material to see if it is in stock. Depending on availability, a material reservation and/or a purchase requisition is generated. These are further processed in Materials Management.
3. When the order transaction has been completed, you select the reference number on the *Material Requirements per Business Event* screen to update the requisition or reservation. If you are using distributed systems, it may be necessary to monitor the transaction via ALE

Material Requirements per Business Event (Report RHMARP00)

Monitoring. If relevant information is missing for the material order, such as organizational data, purchasing data, plant data and so on, an error dialog is generated. You must follow the instructions in the dialog.

4. If the reservation or purchase requisition runs without errors, you can double-click the reference number to display the original reservation document in *Materials Management* or the original purchase requisition document in *Purchasing*.

Activities

1. Set the required options on the selection screen.
2. Choose  to start the report.
3. Choose *Reserve Material*.
4. Check the material order.



If you are performing material procurement in distributed systems (HR and LO in different systems), please note the information contained in [Material Order in Training and Event Management \[Page 455\]](#).

See also:

[Business Process Flow of Material Order \[Page 458\]](#)

[Ordering Material \[Page 460\]](#)

[Checking a Material Order \[Page 461\]](#)

Business Event Prices (Report RHKBRO20)

Use

This report generates a list of internal and external prices for business events of all event types in a given period.

Prerequisites

Internal and external prices must be maintained in the *Prices* infotype (1021) for the event types, otherwise the report cannot output any values.

Features

Selection

You can set parameters to determine the data output by the report.

Selected business event types

If you select this indicator, you specify that the report should only consider event types that have been flagged for inclusion in the event brochure in the *Business Event Type Info* infotype (1029).


This indicator lets you determine that event types only aimed at internal attendees are not listed in the brochure or in the price list.

If you do not select this indicator, the report lists all event types.


Currency

This parameter lets you specify the currency in which internal and external prices are output. If you make no input here, prices are output in the currency in which they were maintained for the event type.

Standard selection screen (only pre-report RHXKBRO2)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHKBRO20 before it is executed.



On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Output



The report generates a list in the SAP List Viewer (ALV) Grid Control that can contain any of the following information depending on your layout specifications:

- Business event type short name
- Business event type name
- Internal price for allocation
- External price for billing

Business Event Prices (Report RHKBRO20)

You can find information on the features and display options of ALV in the documentation of the [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#).

Activities

67. Set the required options on the selection screen.
68. Choose  to start the report.
69. On the list screen that is output, change the list layout to display data that interests you as required. Do so by choosing .

InfoSet: Business Event Information

Definition

Predefined InfoSet in *Training and Event Management* that lets you request reports for business events.

Use

You can request numerous different reports for business event data in the Ad Hoc Query with the InfoSet HR_TEM_EVENT. This InfoSet uses the *Business Event* as its start object. The Ad Hoc Query is a powerful and flexible reporting tool that lets you define queries and reports as required. This involves specifying the selection and output fields you require that are offered in the InfoSet.



In the *Human Resources* application components, the *InfoSet Query* is referred to as the *Ad Hoc Query*.

See also:

[HR in the InfoSet Query \[Ext.\]](#)

Structure

On the initial screen of the Ad Hoc Query, the InfoSet that has been predefined for *Business event* is displayed in the top left frame. This consists of individual field groups (*business event*, *business event information*, *prices*, *business event catalog*, and *business event type*). The field groups, in turn, comprise multiple fields selected from the various infotypes and (where relevant) additional fields that are of thematic interest.

You can select fields for output and selection simply using Drag&Drop or via cursor selection. If no checkbox is displayed beside a field, you cannot select it for the query.



Once you have completed your selection of fields for *selection* and *output*, you will see these fields listed in the bottom left frame under *Output preview* and under *Selections* in the top right frame.

Information on the individual field groups:

- Business event

This field group contains the most important fields from the *Object* infotype (1000) such as *object name*, or *validity*.
- Business event information:

This field group contains a selection of important fields from the *Business Event Info* infotype (1026) such as *locked*, or *canceled*. Additional fields of interest are also displayed such as *event organizer*, *number of available places*, or *effective capacity* (event capacity taking reserved resources into account).
- Prices

InfoSet: Business Event Information

This field group contains all of the fields from the *Price* infotype (1021), the internal price and the external price, with currency fields included.

- Business event location

This field group contains fields from the *Location* that is related with the business event. You can only select these fields as output fields.

- Business event type

This field group contains fields from the *Business Event Type* that is related with the business event. You can only select these fields as output fields.

Integration

Users must be assigned to the user group SAPQUERY/H5 for *Training and Event Management* in order to start the Ad Hoc Query with the predefined InfoSet in the *Information System of Training and Event Management*.

You make this assignment and all other administrative settings required for the InfoSet Query (such as for creating new InfoSets) in the *SAP Easy Access* under *SAP Standard Menu* → *Tools* → *ABAP Workbench* → *Utilities* → *SAP Query*.

Tool Reports

Material Requirements per Business Event (Report RHMARP00)

Material Requirements per Business Event (Report RHMARP00)

Use

This report lets you display what resources of the type *material* (from the material master) are required for business events. You can also use the report to trigger a material reservation for in-stock material or a purchase requisition for non-stock material if required.

If no material is required for a business event, a message to this effect is output.



This report evaluates the amount of material that is available using the assigned resource type. This information is stored for the resource type in the *Availability Indicators* infotype. This infotype specifies whether a material is required per attendee or per business event.

See also:

[Materials Procurement \[Page 106\]](#)

Features

Selection

You can set parameters to determine the data output by the report.

Business event selection


There are a number of ways to start the report:

- d. Enter one or more *business event groups*. The system finds all of the business events belonging to the specified group(s) and displays the material requirements.
- e. Enter one or more *business event types*. The system finds all of the business events belonging to the specified type(s) and their material requirements.
- f. Enter one or more *business events*.


Reporting period

You can specify any period for which you want to determine material requirements. The report only includes business events whose start date lies within the selection period.

Standard selection screen (only pre-report RHXMARP0)

If you select this indicator and choose , the report branches to the more detailed selection screen of the main report RHMARP00 before it is executed.




On the selection screen of the main report, you can select objects by status, for example. As a rule, you need not access the standard selection screen since the pre-report has sufficient data selection options. If you do not want to go to the standard selection screen, do not activate this parameter before you choose .

Material Requirements per Business Event (Report RHMARP00)


Output



The report's *list screen* can contain the following information, depending on your layout specifications:

- Business event name
- Controlling area
- Cost center
- Start and end date of the business event
- Capacity of the business event (minimum, optimum, maximum)
- Bookings
- Material name
- Material number
- Requirement per business event
- Requirement per attendee
- Total requirements (requirements per attendee are multiplied by the number of attendees booked)
- Status of the reservation
- Reference document number for the material reservation (when it has been executed)
- Reference document number for the material order (when it has been executed)

You can specify what data you want output in the list under :

When you choose this function, a dialog box appears with the columns that are hidden on the list screen in the right table, and the columns that are displayed in the left table.

By marking columns and moving the arrows, you can determine what columns are displayed. You can display your changes by choosing .

To save the layout, choose . You can call this layout as required by choosing .

You can find more information about display options on the list screen under [SAP List Viewer \(ALV\) Grid Control \[Ext.\]](#)

On the list screen, you can trigger a material reservation or a purchase requisition for the materials displayed by choosing *Reserve Material*.

The following process flow takes place:


1. When you choose *Reserve Material*, a dialog box appears in which you can decide whether the required amount should be derived from the number of attendees booked or the optimum number capacity of the business event.
2. When you trigger the material order, an availability check is carried out for the material to see if it is in stock. Depending on availability, a material reservation and/or a purchase requisition is generated. These are further processed in Materials Management.
3. When the order transaction has been completed, you select the reference number on the *Material Requirements per Business Event* screen to update the requisition or reservation. If you are using distributed systems, it may be necessary to monitor the transaction via ALE

Material Requirements per Business Event (Report RHMARP00)

Monitoring. If relevant information is missing for the material order, such as organizational data, purchasing data, plant data and so on, an error dialog is generated. You must follow the instructions in the dialog.

4. If the reservation or purchase requisition runs without errors, you can double-click the reference number to display the original reservation document in *Materials Management* or the original purchase requisition document in *Purchasing*.

Activities

5. Set the required options on the selection screen.
6. Choose  to start the report.
7. Choose *Reserve Material*.
8. Check the material order.



If you are performing material procurement in distributed systems (HR and LO in different systems), please note the information contained in [Material Order in Training and Event Management \[Page 455\]](#).

See also:

[Business Process Flow of Material Order \[Page 458\]](#)

[Ordering Material \[Page 460\]](#)

[Checking a Material Order \[Page 461\]](#)

Reference Documents in Training and Events (Report RHREFDOC0)

Use

This report lets you search for and display documents that were generated by operations in billing and activity allocation, and in materials management operations in *Training and Event Management*.



In billing and activity allocation operations (*Internal Activity Allocation* and *Billing* functions), reference documents are generated when attendance is booked.

You can display reference documents for the following operations:

- Cost transfer posting
- Activity allocation: Attendance
- Billing
- Purchase requisition (for non-stock material)
- Reservation (for material in stock)
- Activity allocation: Instructor
- Credit memo

You can search for documents using the following objects:

- Attendees (to search for billing and allocation documents)
- Business events, event types, event groups (to search for billing and allocation documents, and material procurement and cost transfer posting documents)

Integration

If you want to use this report and the corresponding functions, you must have the following components integrated with Training and Event Management:

- Cost Accounting (cost transfer posting and internal activity allocation)
- Sales and Distribution (Billing)
- Materials Management (Material procurement)

Prerequisites

You must execute the following reports to trigger generation or status change of the reference documents:

- RHXCCOS0 or RHCCOS00 for cost transfer posting
- RHXINLV0 or RHINLV00 for internal activity allocation for attendees and credit memo creation

Reference Documents in Training and Events (Report RHREFDOC0)

- RHXINLV1 or RHINLV10 for internal activity allocation for instructors and credit memo creation
- RHXFAKT0 or RHFAKT00 for billing and credit memo creation
- RHXMARP0 or RHMARPO0 for material procurement (for creation of purchase requisitions and material reservations)

Features

Selection

In addition to specifying the objects for the reporting (such as business events) and the reporting period, you can select from the following report parameters:

Document operation

You can make an entry in this field to specify the operation whose documents you want to display. If you make no entry, the report displays all documents for all operations executed for the selected objects.


Operation status

You can specify a status to restrict the display to documents with a given status only. If you make no entry, the report displays all documents generated for the selected objects in all statuses.


Output



The report's list screen can contain the following information, depending on your layout specifications and the objects selected:

- Reference document number
- Original document number
- Status of the operation that generated the document
- Operation that generated the document
- Business event
- Attendee
- Cost item

You can specify what data you want output in the list under .

When you choose this function, a dialog box appears with the columns that are hidden on the list screen in the right table, and the columns that are displayed in the left table.


By marking columns and moving the arrows, you can determine what columns are displayed. You can display your changes by choosing .

To save the layout, choose . You can call this layout as required by choosing .

You can find more information about display options on the list screen under [SAP List Viewer \(ALV\)\) Grid Control \[Ext.\]](#)

Reference Documents in Training and Events (Report RHREFDOC0)

Activities

1. Select the object(s) for which documents were generated (such as a business event for which a document was generated for a material procurement operation). Multiple selection is possible.
2. Enter the *reporting period*.
3. Select the operation (such as Reservation) under *Document operation*.
4. Select an operation status if required. If you make no entry, the report displays all documents in all statuses for all operations executed for the selected objects.
5. Choose . The system creates a list of reference documents.

Workplace Reports

Instructor Scheduling (Report RHXSSREF)

Use

This report lets instructors display details of their own schedule in *Training and Event Management*.

Integration

This is the pre-report of the main report *Instructor Function* (RHSSREF0).



On the selection screen of the main report, you have more selection options for the reporting. With the required authorization you can, for example, display information on the instructor activities of others.

Prerequisites

You must be assigned to the object type *Person* and have the subtype *System user name SAP System* (0001) of the *Communication* infotype (0105) appended.

Features


Selection

Under *Reporting period* you can specify the exact time period for the reporting.

Output


The report's **list screen** can contain the following information, depending on your layout specifications:



- Reporting period
- Resource (instructor's name)
- Business event ID
- Start date of business event
- End date of business event
- Start time on the first day
- End time on the last day
- Number of event days
- Business event duration per day in hours
- Total business event duration in hours

You can specify what data you want output in the list under .

When you choose this function, a dialog box appears with the columns that are hidden on the list screen in the right table, and the columns that are displayed in the left table.

Instructor Scheduling (Report RHXSSREF)

By marking columns and moving the arrows, you can determine what columns are displayed. You can display your changes by choosing .

To save the layout, choose . You can call this layout as required by choosing .

You can find more information about display options on the list screen under [SAP List Viewer \(ALV\)\) Grid Control \[Ext.\]](#)

Infotypes in Training and Event Management

Prices (Infotype 1021)

Prices (Infotype 1021)

Definition

This infotype lets you specify a price for each business event type. This is the price that an attendee has to pay for attendance at a business event. When you create or plan a business event, the price stored for the event type is proposed as default. You can change this price as required. When you book attendance, you can also change this price for each attendee if required.

Use

The *Prices* infotype is used in the following reports:

- *Business Event Prices*
- *Attendance and sales statistics*
- *Maintain prices infotype*

Structure

Specifying prices

- You can specify:
 - an *internal price* for internal activity allocation
 - an *external price* for external billing
- You must specify the price in the appropriate currency.



Depending on the settings you make in Customizing under *Set up control parameters for Cost Accounting*, attendance bookings are processed either free of charge or using the prices stored for each business event type.

Infotype maintenance

You can maintain the *Prices* infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create business event type*.

When you create a business event or book attendance, you can either adopt the prices stored for the business event type, or you can overwrite the proposed prices.

By choosing *Business events* → *Price proposal*, you can determine a price based on the business event costs and transfer this to the *Prices* infotype.

See also:

[Price Proposal \[Page 156\]](#)

Availability Indicators (Infotype 1023)

Definition

An infotype you store for resource types to specify all of the reservation conditions attached to resources of this type.

In this infotype, you specify:

- how resources of this type are classified during resource reservation (indicator *required*)
- In what *quantities* the resources are required
- Whether resources of this type are *location-dependent*.
- That resources of the categories *instructor* or *material* can be found during resource reservation (*Alternative resource search*)

Use

The *Availability Indicators* infotype is used with the following functions and reports:

- In resource selection when you create a business event
- When you request these reports:
 - [Resources Not Yet Assigned per Business Event \[Page 331\]](#)
 - [Ressourcenbelegung pro Ressourcentyp \[Page 306\]](#)

Structure

Resources

- You can classify a resource type as *room*, *instructor*, *material*, or *other resource*. We distinguish between these resource types due to the different characteristics they have.
 - You can specify a minimum, optimum and maximum capacity for the resource type *Room*. This value is then used when the system calculates the number of attendees for a business event during the *Booking* function.

See also:

[Capacity \(Infotype 1024\) \[Page 355\]](#)

- For the resource type *Instructor*, the system proposes a specific relationship with the business event type if you select *Alternative resource search*.
 - For the resource type *Material*, the system proposes a specific relationship with the business event type if you select *Alternative resource search*.
- You can flag resource types as *location-dependent*. If you have activated the *location* switch in your *Training and Event Management* system, the system checks to ensure that a resource is available at the location in question when you reserve resources for a business event.

Availability Indicators (Infotype 1023)

You can specify whether or not you want to use locations in Customizing for *Training and Event Management* under *Business Event Preparation* → *Location* → *Use of Business Event Locations*.

- You can flag a resource type as *required*. You only have to reserve resources that are flagged as *required*, reservation of other resources is optional.



When you choose *automatic resource assignment*, the system only reserves resources that are flagged as *required*.

See also: [Selecting Resources \[Page 111\]](#)

- You can specify whether a resource type that is flagged as *required* can be reserved once only (*single reservation*) or multiple times (*multiple reservation*).
- You can use the *resource priority* feature to define the sequence in which resources are allocated when resources are reserved for a business event date.

Amount available

You can specify per resource type the number of resources that should be available *per business event* and *per attendee*. The required number of resources is derived from the information stored here when a business event is planned.

Alternative resource search

In the *Alternative resource search*, you specify the object type of a resource other than object type G, such as H for *external person* or M for *material*. (Only *rooms* and *other resources* have object type G.) You also specify the relationship between the business event type and the resource type *Instructor* or *Material*.



There is a direct relationship between object type R (resource type) and object type G (*Room* or *Other resource*) so that you do not need to make any further entries for resources that have object type G. They are offered automatically for selection during resource reservation. The reason you must make additional specifications in the *Alternative resource search* is to ensure that the system offers and finds resources that do not have object type G.

If you select resources that belong to the category *instructor* or *material* here, the system automatically defaults the pertinent object types and relationships in the *alternative resource search*. For instructors, the entry * (asterisk) is the default object type. This stands for all object types. If you do not want to restrict the search to a specific object type, you can reserve instructors with different object types for your business events.

In addition, you must also specify the relationships between the business event type and the material ID or the instructor ID.

See also: [Business Event Types \[Page 73\]](#) (paragraph *Structure* under *Relationships*)

Infotype maintenance

You maintain this infotype in Customizing under *Business Event Preparation* or in Current Settings under [Create Resource Type \[Page 84\]](#).

Capacity (Infotype 1024)

Capacity (Infotype 1024)

Definition

Infotype that lets you specify the minimum, optimum, and maximum capacity for resource types, resources, business event types, and business events. If the *minimum* capacity defined for a business event is not reached, the system proposes that the event should be canceled when you go to *firmly book* the event. The *optimum* capacity is used to calculate the resources required and the costs expected. The *maximum* capacity is the maximum number of attendees allowed for a business event.

Use

The *Capacity* infotype is used:

- During resource selection when you reserve resources for a business event to determine the optimum number of attendees for which a resource type should be reserved.
- During resource selection when you reserve resources for a business event to determine the room capacity.
- During attendance booking to monitor the permitted number of essential and normal bookings. The capacities of the room and the business event are compared to establish the overall capacity of the business event.



This value is determined at runtime only. The overall capacity of the business event is displayed on the *Book Attendance* data screen under *Business Event Data* and also in the dynamic *Attendance, Business Event, Tool and Information* menus (by double-clicking the traffic light icon beside the business event dates).

- For the function [Price Proposal \[Page 156\]](#) when the business event price is based on the optimum capacity of the business event.

Structure

The following rules are applied for calculating the overall capacity of a business event:

- Minimum capacity of a business event is the higher of the minimum capacities defined for the resources and the business event.
- Optimum capacity of a business event is the lower of the optimum capacities defined for the resources and the business event.
- Maximum capacity of a business event is the lower of the maximum capacities defined for the resources and the business event.



The following capacity values are stored for a business event:

Minimum = 5, Optimum = 10, Maximum = 15

The room in which the event is to be held has the following capacity values stored:

Minimum = 2, Optimum = 12, Maximum = 12

Capacity (Infotype 1024)

The resulting capacity values relevant for attendance bookings are:

Minimum = 5, Optimum = 10, Maximum = 12



If a resource does not have a *Capacity* infotype record, the capacity values stored for the resource type are taken. If a business event does not have a *Capacity* infotype record, the capacity values stored for the business event type are taken.

If none of these objects has capacity values stored for them, the system takes the standard capacity defined in Customizing for *Training and Event Management* under *Business Event Catalog* → *Control Elements* (switch SEMIN KAP).

- If the minimum capacity is larger than the maximum, the values for optimum and minimum are automatically matched to the maximum value.



The following capacity values are stored for a business event:

Minimum = 10, Optimum = 15, Maximum = 20

The room in which the event is to be held has the following capacity values stored:

Minimum = 2, Optimum = 5, Maximum = 8

The resulting capacities are:

Minimum = 8, Optimum = 8, Maximum = 8

- If the optimum capacity only is smaller than the minimum, the optimum is matched to the minimum.



The following capacity values are stored for the business event:

Minimum = 10, Optimum = 15, Maximum = 20

The room in which the event is to be held has the following capacity values stored:

Minimum = 3, Optimum = 9, Maximum = 12

The resulting capacities are:

Minimum = 9, Optimum = 9, Maximum = 12

Infotype maintenance

- You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create resource type*. This value is proposed as the default value when you create the resource *Room* in the step *Create room*. You can overwrite it.
- If you want to specify the number of attendees, you can maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create business event type*. This capacity is proposed as the default value when you plan or create a business event.

Depreciation Meter/Validity (Infotype 1025)

Depreciation Meter/Validity (Infotype 1025)

Definition

An infotype that lets you store information on the depreciation of qualifications and the validity of business event types.

Use

This information is used in the areas of personnel development, and personnel training and education. The infotype lets you specify the period of time after which a qualification or skill is no longer valid or has depreciated in value and consequently needs to be refreshed.

This, in turn, generates a training need for an employee. In *Training and Event Management* you can assign a validity period to a business event type. You also store information on prerequisite events and follow-up events for business event types. Once the validity period of a business event type expires, the corresponding relationship between the attendee and the business event that was created during follow-up processing becomes invalid. (This is the relationship B034 *has attended event of type*).

In *Personnel Development* the validity period you assign specifies the time period after which a qualification or skill (for example, a pilot's license) needs to be renewed or refreshed.

The depreciation meter specifies the period after which a qualification attained is worth only half its original value.

Structure

Infotype 1025 stores data on the validity period and depreciation meter of qualifications, and the validity of business event types. You can maintain validity data for event types in this infotype.

Integration

You maintain the validity duration of business event types in the *Training and Event Management (PE)* component. You can do so directly for the business event type or by accessing infotype maintenance.

You can maintain the validity period and depreciation meter for qualifications either in the master data catalog in *Training and Event Management* or in the qualifications catalog in the *Personnel Development* component. The data you maintain is stored in infotype 1025. However, you cannot actually maintain this data in the infotype.

Business Event Info (Infotype 1026)

Definition

This infotype lets you append the following additional information indicators to a business event: internal or external flag, session flag, business event language, lock flag, and delete flag.

Use

The *Business Event Info* infotype is used:

- To determine the language in which a business event will be held.
- To establish whether the business event in question is internal or external.
- To determine whether a business event is locked or deleted when you book attendance, since bookings are not allowed for a business event that has been locked or deleted.

Structure

The *Business Event Info* infotype comprises the following information:

Internal/external flag

This indicator shows whether the business event in question is being conducted by the company itself (internal event) or by an external organizer (external event).

Session flag

The function that requires this indicator is not yet available.

Business event language

The business event language specifies the language in which a business event is to be held. You can always change the language you specify here at a later stage.

Lock flag

When you lock a business event because you do not want to allow any further attendance bookings for the time being, a lock indicator is automatically written in the infotype.

Deletion flag

When you cancel a business event, a deletion flag is automatically written in the infotype.

Infotype maintenance

This infotype is maintained automatically when you:

- create or plan a business event
- lock or cancel a business event

Site-Dependent Additional Info (Infotype 1027)

Definition

This infotype allows you to store additional information valid for locations (sites). Such information might include the local calendar, the currency, and the language normally used at a location.

Use

The *Site-Dependent Additional Info* infotype is used:

- To take non-working days into account when planning and creating business events.

Structure

The *Site-Dependent Additional Info* infotype comprises the following information:

Calendar ID

You specify here the factory calendar that should be used when planning a business event for a particular location. This factory calendar is used to determine what days are not workdays at the location in question.



You must first define the factory calendar in Customizing for Training and Event Management under *Basic Settings* → *Controlling Days Off* → *Specify Factory Calendar*.

Language

You specify here the *language* in which business events are normally held at this location.

Infotype maintenance

You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current settings* under *Create location*.

About the Address Infotype (1028)

Definition

Infotype, with which addresses of companies or external trainees as well as information on the location of organizational objects and resources can be stored.

Use

In *Organizational Management*, maintain this infotype for

- Organizational units
- Work Centers
- Positions

The information is for reference purposes only. The infotype is optional.

In *Training and Event Management*, maintain the infotype for

- Business event locations
- Room resources
- External trainees and trainers
- Companies

The Address infotype maintained for the business event location is used in correspondence for notifications such as confirmations of registration, confirmations of attendance. By using a variable in the correspondence, you can control whether the first or second address is to be given.

This infotype must be created for companies or for external attendees and trainers (object type *External Person*).

Structure

To complete the *Address* infotype for locations of rooms, enter the following data:

- Name of building
- Room number



Addresses of buildings are created separately. To maintain addresses of buildings for the purposes of room location information, you must have completed the step [Set Up Building Address \[Ext.\]](#) in Customizing for *Training and Event Management* or in *Current Settings*.

The following information is also maintained for addresses:

- Telephone number
- Fax number
- 2nd Address line

About the Address Infotype (1028)

- Street, House number
- Postal Code, City
- Country key
- Region
- Distance in kilometers

You can store various addresses by creating subtypes. The following subtypes are set up in the SAP Standard system:

Subtype blank: *1st Address*

Subtype 0001: *2nd Address*

Business Event Type Info (Infotype 1029)

Definition

Infotype that lets you store a variety of additional information about a business event type, such as whether the event type should feature in the Employee Self-Service *Training Center*.

Use

The *Business Event Type Info* infotype is used in the following reports and functions:

- In the *business event brochure* report, you can compile a list of business events whose business event types have been flagged for inclusion in the brochure.
- The *convention flag* is used when you book attendance, plan and create business events.
- The indicator *No Intranet* is used to exclude events from display in the Employee Self-Service *Training Center*.
- If your system is integrated with *Time Management*, you can use this infotype to override general settings made in Customizing regarding *Time Management*. For example, it lets you specify that an employee (object type P) may attend a business event on a day off.

Structure

The *Business Event Type Info* infotype includes the following information:

- The *Convention* indicator to specify that a business event type is a multi-session event consisting of multiple sessions running in parallel.
- The indicator *Include in brochure* to specify that a business event type should be included in the business event brochure. When you start the report to generate the event brochure, you can select the option *Selected event types only*. In this case, only event types feature in the brochure for which this indicator has been specifically set.
- The indicator *No Intranet* lets you specify that certain event types are to be excluded from display in the Employee Self-Service *Training Center*.
- In this infotype, you can also make specifications for internal attendees and instructors that apply to the *Time Management* component:
 - *No integration*: You use this indicator to deactivate integration with *Time Management* for attendees and instructors of events of this type. This means that no attendance and absence records are written to *Time Management*.
 - *Allowed in time off*: You use this indicator to specify that a person can attend or hold an event of a certain type even if time off records have been stored for the person during the same period in *Time Management*.
 - *Minimum percentage* (for attendees only): You can use this entry to specify the minimum amount of time an attendee must be present at an event to qualify as attendance. If the value you specify here is not recorded for an attendee, the attendance booking is considered to be insufficient and is automatically canceled. Here, you enter a percentage of the complete event duration.

This entry overrides the value stored for the event type in the SEMIN TIMEP entry under *Integration* → *Time Management* → *Specify Attendance Types*.

Business Event Type Info (Infotype 1029)

Infotype maintenance

You maintain this infotype in Customizing for *Training and Event Management* or in *Current Settings* under *Create business event type*.

Procedure (Infotype 1030)

Definition

An infotype you can store for business event types to specify system reactions to booking and prebooking checks and to specify what actions are to be carried out during follow-up processing.

Use

The *Procedure* infotype is used for checking purposes with all booking and prebooking functions.

The data stored in this infotype is also used after a business event has been attended so that the appropriate follow-up processing can be carried out.

Structure

You define the procedure for the following checks:

- For bookings for business events of the same type
- For prebookings for the same business event type
- For attendance prerequisites (business events previously attended)
- For qualifications and alternative qualifications that are required for attendance of a business event

The system can execute the following actions once attendance has been completed:

- Transfer the business event objectives to the attendee in the form of qualifications
- Delete the attendance relationship between the business event and the attendee
- Create an *attendance history* relationship between the attendee and the business event type for the purpose of checking the attendee's attendance prerequisites for future bookings.

Integration

You can maintain the *Prices* infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create business event type*.

You can also maintain the individual checks in Customizing under *Day-to-Day Activities* → *Booking* → *Attendee checks*. Under *Recurring Activities* → *Follow-Up Processing* you specify the actions that are to be carried out for business events follow-up processing.



If you create the *Procedure* infotype for a business event type, you override *all* of the procedure settings that generally apply for business event types. You make these settings in Customizing for *Training and Event Management* under *Day-to-Day Activities* → *Booking* → *Attendee Checks* and under *Recurring Activities* → *Follow-up*.

Mail Address (Infotype 1032)

Mail Address (Infotype 1032)

Definition

Infotype that lets you store e-mail addresses and other relevant mail information for attendees and instructors (of the object types *External Person*, *Company* and *Organizational Unit*) in *Training and Event Management*.

Use

If this infotype is maintained for attendees and instructors, correspondence notifications regarding activities in *Training and Event Management* can be sent to them by Internet Mail or R/3 Mail if this medium is specified for automatic or manual correspondence output.

Structure

Mail address type: Enter the type of mail system to which the mail address or user name belongs. The subsequent entries you must make depend on the address type you specify:

Internet Mail: You must enter a full Internet e-mail address (SMTP) for this address type.

For the R/3 Mail System you can select one of the following subtypes:

Productive SAP System

SAP1

SAP2

If you choose one of the address types for the R/3 Mail System, under *User* you must also specify the *Office user name* that the user has in the corresponding SAP System. Or under *User* you enter a valid *distribution list* and under *Owner* the owner of the distribution list you specified.

Integration

You can maintain this infotype for the following object types as a rule:

- External Person
- Company
- Organizational unit
- Work center
- Position

Name Format (Infotype 1034)

Definition

An infotype that lets you store information about the formatting used for an [external person's](#) [\[Page 181\]](#) name, name affixes and so on.

Use

Information on the name format is used in particular in the Correspondence component of *Training and Event Management*.

Structure

Name component information is required for formatting an *external person's* name. The following name components exist:

- *Form of address* (for example: Mr., Mrs., Ms) (required entry)
- *Academic title* (for example: Dr., Prof.) (optional entry)
- *Surname prefix* (for example: Von, van der, de la) (optional entry)
- *Name affix* (for example: Lord, Lady) (optional entry)

Besides the name components, you must also specify a person's language and nationality.

This lets you format an external person's name in the way that is usual for this person's country for correspondence purposes. Correspondence notifications are sent in the language specified.

Infotype maintenance

You maintain this infotype when you change or create external persons as attendees or instructors on the *SAP Easy Access* screen under *Training and Event Management* → *Settings* → *Current Settings* → *Attendee or Resource Management* → *External Instructor (External Person)*.



You can set up the required format (per nationality) in Customizing under *Day-to-Day Activities* → *Correspondence* → *Form Creation* → *Specify Name Format for Recipients*.

Schedule (Infotype 1035)

Schedule (Infotype 1035)

Definition

This infotype lets you define a schedule, or timetable, for a business event.

Use

This infotype is used for the following functions:

- The schedule determines attendance times for attendees. This data is required for attendance records if integration with *Time Management* is active.
- The data in the infotype is used to define a business event schedule.
- The schedule also determines the resource reservation for a business event.

Structure

The schedule contains the following information:

- Day number
- Date
- Start and end time
- Flag indicating days off
- Duration in days
- Duration in hours
- Flag indicating a generalized schedule



A *generalized schedule* exists if you created the schedule model *without a pattern*.

In a generalized schedule, each of the days between the start date and end date of the business event (business event date) has a start time of 00.00 hours and an end time of 23:59 hours.

Infotype maintenance

When you create or plan a business event, you can create a schedule either by copying the schedule model of the business event type or by defining a specific schedule for the business event.

See also:

[Creating a Schedule \[Page 100\]](#)

Costs (Infotype 1036)

Definition

This infotype lets you store costs, divided into cost items, per resource type, per resource, per business event type, or per business event.

Use

The data in the Costs infotype is used to record and manage the costs that arise in *Training and Event Management*.

A [price proposal \[Page 156\]](#) can be calculated for a business event based on the total costs, and this price can be transferred to cost accounting.

Structure

- If required, you can subdivide costs into subtypes. The following subtype has been set up in the standard system:
 Subtype 0001: *Normal case*
- You can use the *cost items* that you defined in Customizing in the *step Define Cost Items*. To do this, you must already have completed the step [Define Cost Items \[Page 53\]](#) in Customizing.
- You can define your own values by selecting *Dir.* (direct input). In this case, you enter an *amount* and a *currency*.
- You can define a cost item per *business event* or per *attendee*.



Alternatively, you can define a cost item based on a *time unit* instead or on a time unit and an attendee combined.

Infotype maintenance

You maintain this infotype in Customizing or under *Current settings* on the *Training and Event Management* screen in the following steps:

- *Creating a Resource Type*
- *Create resource*
- *Create business event type*

And also in the following functions:

- *Create business event*
- *Change business event date*

Billing/Allocation Info (Infotype 1037)

Billing/Allocation Info (Infotype 1037)

Definition

This infotype lets you assign sales areas to business event types and to the organizers (usually organizational units) of business events.

Use

The *Billing/Allocation Info* infotype is used to perform billing and activity allocation for attendance fees:

- In billing, the sales area is used, for example, for the conditions per customer.
- In internal activity allocation, the activity type for the service rendered (activity type for event attendance or instructor function) is used.

Structure

You can store the following information for the billing and activity allocation of business event fees in this infotype:

- *Sales area*: The sales area consists of:
 - A *sales organization* (organizational unit that is responsible for the sale of particular products or services)
 - A *distribution channel* (channel via which goods or services reach customers)
 - A *division* (grouping together of materials, products and services).
- *Account assignment group material* (for revenue account determination)
- *Activity type*: The activity type is used to divide up the services (activities) rendered in a cost center according to cost accounting criteria. You must specify the following:
 - *Controlling area*
 - *Activity type for event attendance*
 - *Activity type for instructor function*

Infotype maintenance

You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current settings* under *Create business event type* and *Create organizational unit*.

Schedule Model (Infotype 1042)

Definition

This infotype lets you record a schedule model, that is, the timetable for a business event type.

Use

The data in the *Schedule Model* infotype is used:

- To display the business event duration in the business event brochure
- To display the schedule model in the business event menu
- As a copy template for the schedule when you plan or create a business event.

Structure

You can define a schedule model in various ways:

- You can create a *schedule model with pattern*. To do this, you must first complete the step [Define time schedule \[Page 55\]](#) in Customizing for *Training and Event Management* under *Business Event Preparation*.

A time schedule consists of:

- A *day number*
- One or more *day schedules*
- A *time block* (consisting of a maximum of three time intervals) *per day schedule*



The system automatically calculates the total event duration in both days and hours.

- You can create a *schedule without a pattern*. In this case, you must enter the (total) *duration in days* and the (total) *duration in hours* yourself.



When you plan or create a business event, a *generalized schedule* is generated from a schedule model created *without a pattern*.

- You can create a *user-defined schedule*. In this case, you enter the day number and select a time block.
- You can specify whether the business event should consist of *one date* or *several dates*. *Several dates* means that the schedule recurs multiple times at specified intervals.
- You can select a *start day*, that is, a particular day of the week as the start day. Otherwise, the start day is *undefined*.

You can use subtypes to divide the schedule model into different schedule models.

The following subtypes have already been set up in the standard system:

Subtype 0001: *main schedule*

Subtyp 0002: *alternative schedule*

Schedule Model (Infotype 1042)

Subtype 0003: *temporary schedule*

In Customizing, you can set up further schedule models as subtypes.

Infotype maintenance

You append this infotype to business event types when you create or change an event type in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create Business Event Type*.

Demand (Infotype 1060)

Definition

The *Demand* infotype stores information on the number of business events of a particular type that is required in a specific time period.

Validity specifications

The following specifications apply to the validity of infotype records:

- The validity period of an infotype record should span a whole year where possible.
- The year in the end date must be the same as the year in the start date.
- The start date proposed by the system for the infotype record is the same as the validity start date of the business event type. The end date is automatically defaulted to the last day of the same year. You may overwrite both dates.

If you intend to create the *Demand* infotype for a business event type, it makes sense to define 01/01 as its validity start date. This way, you ensure that the validity of the infotype record spans a whole year.



If the validity start date you specify is not 01/01 of the year, a warning is displayed. You may ignore the warning.

- To ensure data consistency, it is not possible to create a record whose validity period overlaps the validity period of an existing record.

Use

The *Demand* infotype is used in conjunction with the *planning* function. The report [business event demand \[Page 310\]](#) lists the demand that exists for selected business event types, sorted by language and by location.

Structure

You can create demand per **quarter**, per **location**, and per **language**.

Integration

You maintain this infotype in Customizing for *Training and Event Management* under *Business Event Preparation* or in *Current Settings* under *Create Business Event Type*. Alternatively, you can create demand when you carry out business event planning in the *Planning Menu*.



You have the option of creating the *Demand* infotype or determining what demand there is for events when you plan business events in the *Planning* menu.

See also:

[Demand Determination \[Page 121\]](#)

Web Link (Infotype 1061)

Definition

Infotype that lets you create links from business event types, events, and event locations to Internet addresses of your choice.

Use

The *Web Link* lets you link *Training and Event Management* objects (such as events, event types, and locations) to multiple sources of information, materials and so on that is relevant for them.



For example, you can create a link between a business event type and the training course that is used to teach it, enabling you to offer attendees the possibility of online learning.

You can link information such as directions of how to get to the event location, for example.

Structure

You can display URL addresses that are linked to an event or event type with the function *Display business event/business event type* from the *Web Link* infotype.



It is even easier to display linked URL addresses from the *dynamic business event menu*. There, you simply select the object of interest (event or event type), and call the web site with the right mouse button or by choosing *Extras → Web Link*.

You specify the URL address in the infotype itself. Once you choose *Save*, you have created the *Web Link* infotype for the selected object.

You can link multiple URL addresses with an object in this way.

Integration

You create a link when you execute the functions *Create or Change Business Event Type/Event Date/Location*. From here you can create the *Web Link* infotype for the object concerned.

Knowledge Link (Infotype 1062)

Knowledge Link (Infotype 1062)

Definition

You can use this infotype to create a link from business events and event types to any of the info objects in the *SAP Knowledge Warehouse* (such as training materials or documentation).

Use

The *Knowledge Link* lets you link *Training and Event Management* objects such as events and event types to multiple sources of information that is relevant for them.



For example, you can create a link between a business event type and the training course that is used to teach it, enabling you to offer attendees the possibility of online learning.

Structure

You can display info objects that are linked to an event or event type with the function *Display business event/business event type* from the *Knowledge Link* infotype.



An easier way of displaying info objects linked via the *Knowledge Link* is from the *dynamic business event menu*. There, you simply select the object of interest (event or event type), and call the info object with the right mouse button or by choosing *Extras → Knowledge Link*.

You can create a link from the functions *Business Event Type/Create or Change Date*. From here you can create the *Knowledge Link* infotype for the object concerned.

On the infotype maintenance screen, select the info class of the info object you want to link (e.g. *Training*) and enter a search term (such as the name of the info object). In the hit list, select the info object you want to link and choose *Transfer*. Once you choose *Save*, you have created the *Web Link* infotype for the selected object.

You can link multiple info objects with an object in this way.

Integration

If you want to use the *Knowledge Link* infotype, you must have the *SAP Knowledge Warehouse* (Info database version 4) installed.

If you use *Training and Event Management* and the *SAP Knowledge Warehouse* in separate systems, you must create the required RFC destinations in Customizing for *Training and Event Management* under *Integration → Knowledge Provider → Document Management Service → Maintain Document Management Area* and enter them under *Tools → Administration → Administration → Network → RFC Destinations*.

Business Event Group Info (Infotype 1063)

Definition

Infotype that lets you flag a business event group as a subject area for selection in the search area of the Employee Self-Service *Training Center* (PV7I). The underlying event types can then be selected.

Use

This new infotype *Business Event Group Info* lets you specify whether a given event group is included as a subject area for selection or not. When an employee selects a specific subject area (event group), only events belonging to this group are displayed.

This infotype lets you specify what event groups are to be included and what event groups excluded from display in the ESS search area.



If you select the option *All Subject Areas*, however, you can display all event groups, not just those that are flagged in this infotype. If you want to exclude certain events from display in the Employee Self-Service *Training Center* generally, you must maintain the indicator *No intranet display* in the *Business Event Type Info* infotype specifically for such events.

For more information, refer to [Business Event Type Info \(Infotype 1029\) \[Page 362\]](#).

Structure

In this infotype, you can only select the option *Subject Area*. In the standard system, the option is not selected.

Integration

You can maintain this infotype when you create or change a business event group.

Web Applications in Training and Event Management

Employee Self-Service (ESS) in Training and Event Management

Service Training Center

Use

This Employee Self-Service lets employees display the current business event offering. With the required authorization, employees can book attendance for events in this service or, alternatively, submit attendance requests for a supervisor's approval. An integrated approval workflow enables a supervisor to convert an attendance request into an actual event booking.

Integration

This service should be integrated with the service [My Bookings \[Page 383\]](#) that lets employees display their current bookings, make rebookings, and cancel bookings. These functions can also be integrated with an approval workflow where required.

If you use the *R/3 Appointment Calendar* integrated with *Training and Event Management*, employees can view their own appointment calendars directly from the list of events. This function requires no additional modifications. You also have the option of integrating an external calendar.

Prerequisites

- If you want to connect an external search engine to facilitate the search for events, you must configure the relevant settings in Customizing for *Training and Event Management* under *Basic Settings* → *Dialog Control* → *Technical Settings* → *Set Up External Search Engine*.

Features

- Extensive options are available for searching in texts for business events. You can perform a fulltext search for business events in the event titles (short texts), or in the business event descriptive text (stored in the *Description* infotype and its subtypes).
- The *Extended Search* option lets you search for business events on the following objects:
 - Prerequisite/imparted qualifications
 - Roles (listed under *Target group*)
 - Target group
 - Development plan (listed under *Aspired qualification*)
- Considerably enhanced and accelerated searches (fuzzy search options for example) through the possibility to integrate an external search engine.
- Automatic triggering of workflow [Approve Employee's Attendance Booking \[Page 465\]](#) when an attendance request is submitted. Automatic booking and notification of the employee on supervisor's approval of the attendance request. Use of user-defined workflow templates.
- Creation of a shopping basket. Employee can book multiple business events in one step or submit multiple attendance requests simultaneously. Save shopping basket for later editing. Delete contents of shopping basket as desired.
- Display of detailed information on business events: business event description (all existing subtypes of the *Description* infotype), time schedule, price, business event language,

Service Training Center

location, reservation information (availability of places etc.), access to materials and documents linked via the *Web Link* (infotype 1061). All linked info objects are displayed.

- Creation of links for event locations too via *Web Link* (infotype 1061). The first URL link created (the first infotype record) is displayed. This could be a map giving directions how to get to the location, for example.

Service Name

The service name of this Employee Self-Service is PV7I. You can find all the relevant data under this service name in the R/3 System.

R/3 Development Objects



Any changes made to R/3 development objects used in this service are considered modifications. You may not change the development objects of the Standard System.

The following development objects are relevant for this service:

Development class	PP09
Transaction	PV7I
Function group for Net Scenarios	HRTEM00NET

Activities

[Displaying and Editing the Training Center \[Page 381\]](#)

[Displaying and Editing the Shopping Basket \[Page 382\]](#)

Displaying and Editing the Training Center

Displaying and Editing the Training Center




1. You are on the initial screen of the search for education and training events. Enter a text string and, if required, other search criteria (such as the business event language).


If you want to search on additional criteria such as prerequisite or imparted qualifications (including development plans), or target groups (including roles), choose *Extended search*. Choose *Start search*.
2. The list of business events found is displayed. Click a business event to access detailed information about it (such as contents, schedule, Web Links). Choose *Back* to return to the hit list.

If a business event location is underlined, you can click it to access more details about the location.
3. For each of the business events that interests you, choose *Add to shopping basket*. Once you have selected the required event dates, choose *To basket*.

Proceed with [Displaying and Editing the Shopping Basket \[Page 382\]](#)

Displaying and Editing the Shopping Basket

You are on the *Training Center: Shopping Basket* screen. The business events currently in your shopping basket are listed. Status icons are displayed beside each of the business events: ,  or .

Under *Booking information*, click the icon for information on what it means. For example,  means that the business event is fully booked and that only waiting list bookings are possible.

Choose *Delete from shopping basket* for events that you do not want to book right now, or choose *Save shopping basket* if you want to continue editing it at a later stage.

Choose *Proceed to Booking*. The *Training Center: Book Business Event Definitively* screen appears. A list of the business events currently in your shopping basket is displayed.

Choose *Book business event* to complete the booking transaction. If you do not have the required authorization to book, a message to this effect is displayed. Your booking request will be submitted to your supervisor for approval in this case.

Back to [Displaying and Editing the Training Center \[Page 381\]](#)

Service My Bookings

Service My Bookings

Use

This Employee Self-Service enables employees to view all of their bookings and the status of each booking. With the required authorization, employees can rebook or cancel bookings in this service or, alternatively, submit rebooking or cancellation requests for approval. Automatic approval workflows can be triggered when requests for rebooking or cancellation are submitted.

Employees can appraise events they have attended in this service.

This service offers the following advantages:

- human resource administrators and line managers are relieved of administrative tasks
- the employee's sense of responsibility and control is increased

Integration

This service should be integrated with the service [Training Center \[Page 379\]](#) that lets employees make bookings for business events. This function can also be integrated with an approval workflow where required.

Prerequisites

A mini master data record must be created for each employee. Infotype 105 must be created for the employee.

Features

- A list is displayed with details of the employee's booking operations. This includes the status per business event:
 - Attendance requested
 - Booked
 - Canceled
 - Rebooked
 - Booked on waiting list
 - Attended
 - Requested booking
 - Current booking
 - Cancellation requested
 - Business event canceled
 - Takes place today
- At the end of the list, the total event costs accrued, split by currency, are displayed.
- With the required authorization the employee can rebook or cancel attendance bookings from the list display, or submit cancellation or rebooking requests.

Service My Bookings

- The approval workflow [Approve Employee's Rebooking \[Page 469\]](#) can be triggered automatically when a rebooking request is submitted. The approval workflow [Employee's Attendance Cancellation \[Page 467\]](#) can be triggered automatically when a cancellation request is submitted. If the supervisor approves the requests, the employee is automatically notified by mail and the requested transaction is executed. User-defined workflow templates can be used. User-defined workflow templates can be used.
- Display of detailed information on business events: business event description (all existing subtypes of the *Description* infotype), time schedule, price, business event language, location, reservation information (availability of places etc.), access to materials and documents linked via the *Web Link* (infotype 1061). All linked info records are displayed.
- Attendees can create appraisals for business events they have attended from the detailed information screen. The only prerequisite is that the business event has already begun and has the status *firmly booked*.
- The employee can directly access the shopping basket from this service if he or she saved a shopping basket for later editing in the service *Training Center*. The employee can also initiate a search for business events from that point.

Service Name

The service name of this Employee Self-Service is PV8I. You can find all the relevant data under this service name in the R/3 System.

R/3 Development Objects



Any changes made to R/3 development objects used in this service are considered modifications. You may not change the development objects of the Standard System.

The following development objects are relevant for this service:

Development class	PP09
Transaction	PV8I
Function group for Net Scenarios	HRTEM00NET

Activities

[Displaying and Editing My Bookings \[Page 385\]](#)

[Displaying and Editing the Shopping Basket \[Page 382\]](#)

Displaying and Editing My Bookings

Displaying and Editing My Bookings

You are on the screen displaying your booking data, that is, details of your event bookings or cancellations. The current status of each event booking is displayed (for example, booked or canceled).

1. Click a business event to display more detailed information. On the detail screen, you can create *appraisals* for events that have already begun.
2. Choose *Rebook date* if you want to switch your booking to another date. Alternative dates are proposed where available. Choose *Rebook definitively* to confirm the transaction.
3. Choose *Cancel* if you want to cancel one of your bookings. Any cancellation fees to be levied are displayed. If you still want to cancel the booking, choose *Cancel* again.

The list of bookings is refreshed after each transaction you execute. To access the current training offering in the *Training Center* choose *Search*. You can make additional bookings from here.

Service List of Events

Use

The Internet service *List of Events* provides support for the organization and management of business events by giving internal Intranet users access to an event calendar divided into subject areas. Users can consult this calendar for information on events that are of interest to them, including information on event dates, contents, instructors, availability of places, and attendance fees.

Organizers of internal education and training events can use this service to make the companywide business event offering accessible to all employees via the intranet.

The attractive presentation of calendar data (calendar of events) managed in R/3, coupled with its universal accessibility, offers decided advantages to event organizers. The application can lead to reduced advertising and printing costs for organizers. The data is always up-to-date.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

Prerequisites

To use this service, you should have the R/3 component *Training and Event Management* installed and have already set up a business event catalog in R/3. The business events you offer can be aimed at your own employees or at external attendees.

Authorizations/Security

Since the event calendar should be accessible to all users, you can define a standard authorization profile for the service PV01.

You create an authorization profile in Customizing for R/3 Basis under *Basis → Application Personalization → Menus and Authorizations → Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu*. The required authorization profile can then be generated from this single role.

With this security option, users need no additional user ID or password to gain access to the *List of Events*.

Standard Settings and Default Values

This service requires no special settings in Customizing for *Training and Event Management*.

To use this service, you must set up a business event catalog in Training and Event Management.



You can find detailed information on this under *Application Help* for *Training and Event Management*.

Service List of Events

Features

Modification Options

The service *List of Events* is output through the Internet Transaction Server (ITS). Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the service by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this service are as follows:

SAPLRHVI_2000.HTML

SAPLRHVI_2100.HTML

SAPLRHVI_2200.HTML

SAPLRHVI_2300.HTML

SAPLRHVI_2310.HTML

SAPLRHVI_2320.HTML

SAPLRHVI_2330.HTML

SAPLRHVI_2340.HTML

SAPLRHVI_2400.HTML

SAPLRHVI_2410.HTML

SAPLRHVI_2420.HTML

SAPLRHVI_2430.HTML

SAPLRHVI_2440.HTML

Service Name

The name of this service is PV01. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this service. These objects should not be changed.

Development class	PP09
Transaction	PV01
Function group for the screens	RHVI
Function modules	BAPI_BUS_EVENTGROUP_LIST

Service List of Events

	BAPI_BUS_EVENTTYPE_LIST
	BAPI_BUS_EVENT_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_LANGUAGE
	BAPI_BUS_EVENT_LOCATION
	BAPI_BUS_EVENT_SCHEDULE

Activities

[Displaying the List of Events \[Page 389\]](#)

Displaying the List of Events

Displaying the List of Events

1. Specify the following search criteria on the initial screen:
 - a) The start and end date of the selection period for the business events.
 - b) The language in which the events are held.
 - c) The location of the business events.
2. Choose *Find*.

The system searches the event calendar and lists the tracks or subject areas that match the search criteria. The list is formatted as a table of contents.

To display all underlying event groups and types, choose *Expand all*.
3. Select a subject area that interests you.

A list of the business event types in the selected area is displayed.
4. Select a business event type. A list of business event dates, where available, is displayed. (This is indicated by an underlined event type.)



You can access further information on the business event types or on the individual event dates (such as schedules or classrooms) using the information icons beside the list.

Service Book Attendance

Use

The Employee Self-Service *Book Attendance* empowers R/3 users to make bookings or prebookings for business events directly via Intranet. To do so, the user can display your company's calendar of events, which lists the business events offered. The calendar, divided into subject areas or tracks, contains information about event dates, contents, instructors, availability of places, and fees.

The user can select a suitable event date from the business event offering and make a booking for it. If there is no suitable date scheduled for the event, the user can make a prebooking for the event type.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

Prerequisites

Authorizations/Security

Customers can implement different security measures for this application by adjusting the setup of system authorizations. All security measures are based on standard R/3 authorizations.

Since the service *Book Attendance* should be accessible to all users, you can set a standard user for the application. A standard user is a default user that can be assigned to all R/3 users.

You create an authorization profile for the service *Book Attendance* in Customizing for R/3 Basis under *Basis* → *Application Personalization* → *Menus and Authorizations* → *Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu*, transaction PV00 *Book Attendance* and transaction PV02 *Prebook Attendance*. The required authorization profile can then be generated from this single role.

The user logs on to the service *Book Attendance* with his or her R/3 user ID and password.

Standard Settings and Default Values

This service requires no special settings in the R/3 application component. You can find out what data has to be maintained in Customizing in the *Training and Event Management Implementation Guide*.

To use the service *Book Attendance*, you must create a business event catalog in the R/3 component *Training and Event Management*.

You can do so by choosing *Current settings* in the main menu and creating an event calendar consisting of business event groups, types and dates, including any additional information, such as attendance fees, location, instructor, or language.



You can find detailed information on this procedure under *Application Help* for *Training and Event Management*.

Service Book Attendance**Features****Modification Options**

The service *Book Attendance* is output through the Internet Transaction Server. Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the service by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this service are as follows:

SAPLRHVI_2000.HTML

SAPLRHVI_2100.HTML

SAPLRHVI_2200.HTML

SAPLRHVI_2300.HTML

SAPLRHVI_2310.HTML

SAPLRHVI_2320.HTML

SAPLRHVI_2330.HTML

SAPLRHVI_2340.HTML

SAPLRHVI_2400.HTML

SAPLRHVI_2410.HTML

SAPLRHVI_2420.HTML

SAPLRHVI_2430.HTML

SAPLRHVI_2440.HTML

SAPLRHVI_2500.HTML

SAPLRHVI_5000.HTML

SAPLRHVI_5100.HTML

SAPLRHVI_5200.HTML

SAPLRHVI_5250.HTML

Service Name

The name of this service is PV3I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this service. These objects should not be changed.

Service Book Attendance

Development class	PP09
Transaction	PV3I
Function group for the screens	RHVI
Function modules	BAPI_BUS_EVENTGROUP_LIST
	BAPI_BUS_EVENTTYPE_LIST
	BAPI_BUS_EVENT_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_LANGUAGE
	BAPI_BUS_EVENT_LOCATION
	BAPI_BUS_EVENT_SCHEDULE
	BAPI_PREBOOK_ATTENDANCE
	BAPI_BOOK_ATTENDANCE
	BAPI_ATTENDEE_BOOK_LIST

Activities

[Booking Attendance \[Page 393\]](#)

Booking Attendance

Booking Attendance

1. Specify the following search criteria on the initial screen of the List of Events:
 - a. The start and end date of the selection period for the business events.
 - b. The language in which the events are held.
 - c. The location of the business events.
2. Choose *Find*.

The system searches the event calendar and lists the subject areas or tracks that match the search criteria. The list is formatted as a table of contents.

To display all underlying event groups and types, choose *Expand all*.
3. Select a subject area that interests you. A list of the business event types in the selected area is displayed.
4. Select a business event type. A list of business event dates, where available, is displayed. (This is indicated by an underlined event type.) If you want to make a booking for one of these dates, proceed as described in step 5.

If no suitable date is scheduled, you can choose *Prebook* by clicking the icon. Then choose *Confirm*.
5. Choose *Book* by clicking the icon beside the event date. A confirmation prompt appears. When you choose *Confirm*, you are booked for the event date.



Users can also access information about business events for which they are already booked or prebooked by choosing *Booked Events*.

Service View Attendance

Use

The Employee Self-Service *View Attendance* enables R/3 users to access information on bookings they have made for training courses or other business events offered by your company. Via the Intranet, they can call up a list of business events they have already attended or events that they are booked to attend. The user can also find out details such as event dates, contents, qualifications imparted, and attendance fees.

With the required authorization, R/3 users can gain access to details of other users' bookings. The head of department, for example, can find out what business events his or her staff have attended. In this way, he or she can obtain an overview of the qualifications attained by employees or keep track of the cost of education and training measures in the department.

This service offers Web users a number of advantages. Users can access information on their own bookings or prebookings. Business event data administered in R/3 is presented attractively and is universally accessible. The fact that users are in a position to inform themselves can lead to reduced costs for internal communications in the company. Attendees have access to the most up-to-date data.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

Prerequisites

Authorizations/Security

Customers can implement different security measures for this application by adjusting the setup of system authorizations. All security measures are based on standard R/3 authorizations.

Since the service *View Attendance* should be accessible to all users, you can set a standard user for the application. A standard user is a default user that can be assigned to all R/3 users.

You create an authorization profile for the service *View Attendance* in Customizing for R/3 Basis under *Basis* → *Application Personalization* → *Menus and Authorizations* → *Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu*. The required authorization profile can then be generated from this single role.

With this security option, users need no additional user ID or password to gain access to the application *View Attendance*.

Standard Settings and Default Values

This service requires no special settings in Customizing for *Training and Event Management*. You can find out what data has to be maintained in Customizing in the *Training and Event Management* Implementation Guide.

To use this service, you must create a business event catalog in the R/3 component *Training and Event Management* and offer event dates for which attendees can be booked.

You can do so by choosing *Current settings* in the main menu and creating an event calendar consisting of business event groups, types and dates, including any additional information, such as attendance fees, location, instructor, or language.

Service View Attendance



You can find detailed information on this procedure under *Application Help for Training and Event Management*.

Features

Modification Options

The service *View Attendance* is output through the Internet Transaction Server. Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the service by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this service are as follows:

SAPLRHVI_2410.HTML

SAPLRHVI_2420.HTML

SAPLRHVI_2430.HTML

SAPLRHVI_2440.HTML

SAPLRHVI_5000.HTML

SAPLRHVI_5100.HTML

SAPLRHVI_5125.HTML

SAPLRHVI_5150.HTML

SAPLRHVI_5175.HTML

SAPLRHVI_5200.HTML

SAPLRHVI_5250.HTML

Service Name

The name of this service is PV1I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this service. These objects should not be changed.

Development class	PP09
Transaction	PV1I
Function group for the screens	RHVI
	BAPI_ATTENDEE_BOOK_LIST

Service View Attendance

	BAPI_ATTENDEE_PREBOOK_LIST
	BAPI_COMPANY_BOOK_LIST
	BAPI_COMPANY_PREBOOK_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO

Activities

[Viewing Attendance \[Page 397\]](#)

Viewing Attendance

Viewing Attendance

1. You have accessed your company's intranet site and started the service *View Attendance*.

Enter your R/3 user, password and the required language.

2. On the initial screen, enter your own attendee ID or an ID for which you have authorization, and the relevant attendee type.



If you have a personnel number in the R/3 System, this number is automatically proposed as attendee ID. The attendee type *Person* is also automatically proposed in this case.

3. You can restrict the search for bookings or prebookings by entering a selection period, consisting of a start and end date.
4. Choose *Find*.

A list of booked or prebooked business events that match the criteria is displayed in tabular form.



In the case of bookings, the system displays the actual event dates. In the case of prebookings, the business event type is displayed. The status feature lets you distinguish between event bookings and event type prebookings.

Service Cancel Attendance

Use

This Employee Self-Service empowers R/3 users to cancel their own bookings on business events offered by your company. To do so, they access your event calendar, find the relevant business event date for which they are booked and cancel the booking.

Event organizers can cancel attendance bookings made for their events. Users can save on costs communicating with the organizer by accessing and editing the information themselves on the corporate intranet.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

Prerequisites

Authorizations/Security

Customers can implement different security measures for this application by adjusting the setup of system authorizations. All security measures are based on standard R/3 authorizations.

Since the service *Cancel Attendance* should be accessible to all users, you can set a standard user for the service, which you can then assign to all R/3 users. A standard user is a default user that can be assigned to all R/3 users.

You create an authorization profile in Customizing for R/3 Basis under *Basis → Application Personalization → Menus and Authorizations → Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu* and PV04 *Cancel Attendance*. The required authorization profile can then be generated from this single role.

The user logs on to the service with his or her R/3 user ID and password.

Standard Settings and Default Values

This service requires no special settings in the R/3 application component. You can find out what data has to be maintained in Customizing by referring to the Implementation Guide for *Training and Event Management*.

To use this service, you must create a business event catalog in the R/3 component *Training and Event Management*.

You can do so by choosing *Current settings* in the main menu and creating an event calendar consisting of business event groups, types and dates, including any additional information, such as attendance fees, location, instructor, or language.



You can find detailed information on this procedure under *Application Help* for *Training and Event Management*.

Service Cancel Attendance

Features

Modification Options

The service *Cancel Attendance* is output through the Internet Transaction Server. Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the service by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this service are as follows:

SAPLRHVI_2400.HTML

SAPLRHVI_2410.HTML

SAPLRHVI_2420.HTML

SAPLRHVI_2430.HTML

SAPLRHVI_2440.HTML

SAPLRHVI_2500.HTML

SAPLRHVI_2600.HTML

SAPLRHVI_5000.HTML

SAPLRHVI_5100.HTML

SAPLRHVI_5125.HTML

SAPLRHVI_5150.HTML

SAPLRHVI_5175.HTML

SAPLRHVI_5200.HTML

SAPLRHVI_5250.HTML

Service Name

The name of this service is PV5I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this service. These objects should not be changed.

Development class	PP09
Transaction	PV5I
Function group for the screens	RHVI
Function modules	BAPI_BUS_EVENTGROUP_LIST

Service Cancel Attendance

	BAPI_BUS_EVENTTYPE_LIST
	BAPI_BUS_EVENT_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_LANGUAGE
	BAPI_BUS_EVENT_LOCATION
	BAPI_BOOK_ATTENDANCE
	BAPI_ATTENDEE_BOOK_LIST
	BAPI_ATTENDEE_CANCEL

Activities

[Canceling Attendance \[Page 401\]](#)

Canceling Attendance

Canceling Attendance

Use

You use this service to cancel your own bookings for business events offered by your company.

Procedure

1. You have accessed your company's intranet site and started the service *Cancel Attendance*. You are logged on with your R/3 user, password and in the required language.

On the initial screen, you can enter the start and end date of the selection period for the business events to restrict the bookings and prebookings displayed.

2. Choose *Find*.

A list of all your bookings and prebookings in the selection period is displayed. A trash can icon is displayed beside the bookings.

3. Select the business event you want to cancel and click the trash can icon for *Cancel*.

A window appears displaying the selected event again.

4. When you choose *Confirm* the cancellation is effected.



If you want to cancel processing, choose *Back*. The booking is then retained.

Internet Application Component Calendar of Events

Use

The Internet Application Component (IAC) *Calendar of Events* provides support for the organization and management of business events by giving external Internet users access to an event calendar divided into subject areas. Users can consult this calendar for information on events that are of interest to them, including information on event dates, contents, instructors, availability of places, and attendance fees.

Professional commercial providers of seminars, training courses, and other events can use this application to make their business event catalog universally accessible.

The attractive presentation of calendar data (calendar of events) managed in R/3, coupled with its universal accessibility, offers decided advantages to event organizers. The application can lead to reduced advertising and printing costs for organizers. The data is always up-to-date.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

For more information on Internet Application Components, refer to [SAP Internet Applications \[Ext.\]](#).

Prerequisites

To use this IAC, you should have the R/3 component *Training and Event Management* installed and have already set up a business event catalog in R/3.

Authorizations/Security

Since the event calendar should be accessible to all users, you can define a standard authorization profile for the service PV0I.

You create an authorization profile in Customizing for R/3 Basis under *Basis → Application Personalization → Menus and Authorizations → Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu*. The required authorization profile can then be generated from this single role.

With this security option, users need no additional user ID or password to gain access to the IAC *Calendar of Events* since they are already logged on with the required password and ID when they call the IAC.

Standard Settings and Default Values

This IAC requires no special settings in Customizing for *Training and Event Management*.

To use the Internet application *Calendar of Events*, you must first set up a business event offering. You do so by choosing *Current settings* in the main menu and creating an event calendar consisting of business event groups, types and dates, including any additional information, such as attendance fees, location, instructor, or language.



You can find detailed information on this under *Application Help* for *Training and Event Management*.

Internet Application Component Calendar of Events**Features****Modification Options**

The IAC *Calendar of Events* is output through the Internet Transaction Server (ITS). Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the IAC by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this IAC are as follows:

SAPLRHVI_2000.HTML

SAPLRHVI_2100.HTML

SAPLRHVI_2200.HTML

SAPLRHVI_2300.HTML

SAPLRHVI_2310.HTML

SAPLRHVI_2320.HTML

SAPLRHVI_2330.HTML

SAPLRHVI_2340.HTML

SAPLRHVI_2400.HTML

SAPLRHVI_2410.HTML

SAPLRHVI_2420.HTML

SAPLRHVI_2430.HTML

SAPLRHVI_2440.HTML

Service Name

The service name of this IAC is PV0I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this IAC. These objects should not be changed.

Development class	PP09
Transaction	PV0I
Function group for the screens	RHVI
Function modules	BAPI_BUS_EVENTGROUP_LIST

Internet Application Component Calendar of Events

	BAPI_BUS_EVENTTYPE_LIST
	BAPI_BUS_EVENT_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_LANGUAGE
	BAPI_BUS_EVENT_LOCATION
	BAPI_BUS_EVENT_SCHEDULE

Activities

[Displaying the Calendar of Events \[Page 405\]](#)

Displaying the Calendar of Events

Displaying the Calendar of Events

5. Specify the following search criteria on the initial screen:

- a) The start and end date of the selection period for the business events.
- b) The language in which the events are held.
- c) The location of the business events.

6. Choose *Find*.

The system searches the event calendar and lists the tracks or themes that match the search criteria. The list is formatted as a table of contents.

To display all underlying event groups and types, choose *Expand all*.

7. Select a theme that interests you.

A list of the business event types in the selected track is displayed.

8. Select a business event type. A list of business event dates, where available, is displayed. (This is indicated by an underlined event type.)



You can access further information on the business event types or on the individual event dates (such as schedules or classrooms) using the information icons beside the list.

Internet Application Component Book/Prebook Attendance

Use

The Internet Application Component *Book/Prebook Attendance* enables Web users to book attendance via Internet for business events offered by your company. To do so, the user can display your company's calendar of events, which lists the business events offered. The calendar, divided into subject areas or tracks, contains information about event dates, contents, instructors, availability of places, and fees.

The user can select a suitable event date from the business event offering and make a booking for it. If no suitable date is scheduled, the user can make a prebooking for the event type.

This IAC provides R/3 users with a cost-effective way of making bookings and prebookings for business events offered by the company using Employee Self-Service applications.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

For more information on Internet Application Components, refer to SAP Internet Applications.

Prerequisites

Authorizations/Security

Customers can implement different security measures for this application by adjusting the setup of system authorizations. All security measures are based on standard R/3 and R/3 Internet user authorizations.

Since this IAC should be accessible to all Internet users, you need to define a global R/3 Internet user profile for all users accessing the application, which you can then assign to each user.

You create an authorization profile for the application in Customizing for R/3 Basis under *Basis* → *Application Personalization* → *Menus and Authorizations* → *Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu*, transaction PV00 *Book Attendance* and transaction PV02 *Prebook Attendance*. The required authorization profile for the global R/3 user can then be generated from this single role.

Users of this application must be in possession of an R/3 Internet user ID to gain access to this application.

You generate this authorization by choosing the function *Internet user* (transaction SU05). Here you can create an Internet user for the Business Object Repository (BOR) object type **PDOTYPE_PT** and set an initial password.

For example, if you define such a user for an external person (object type H) with the object ID 00000055, you must make the following entries in transaction SU05:

ID: 01H 00000055 (the ID is made up of the plan version, the object type, and the object ID. It must exist as an object in *Training and Event Management*.)

Type: PDOTYPE_PT.

Once the R/3 Internet user has accessed this IAC and logged on with the Internet user ID, he or she can book or prebook attendance for business events.

Internet Application Component Book/Prebook Attendance**Standard Settings and Default Values**

This IAC requires no special settings in Customizing for *Training and Event Management*.

To use this IAC, you must create a business event catalog in the R/3 component *Training and Event Management*.



You can find detailed information on this under *Application Help* for *Training and Event Management*.

Features**Modification Options**

The IAC *Book/Prebook Attendance* is output through the Internet Transaction Server (ITS). Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the IAC by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this IAC are as follows:

SAPLRHVI_2000.HTML
SAPLRHVI_2100.HTML
SAPLRHVI_2200.HTML
SAPLRHVI_2300.HTML
SAPLRHVI_2310.HTML
SAPLRHVI_2320.HTML
SAPLRHVI_2330.HTML
SAPLRHVI_2340.HTML
SAPLRHVI_2400.HTML
SAPLRHVI_2410.HTML
SAPLRHVI_2420.HTML
SAPLRHVI_2430.HTML
SAPLRHVI_2440.HTML
SAPLRHVI_2500.HTML
SAPLRHVI_5000.HTML
SAPLRHVI_5100.HTML
SAPLRHVI_5200.HTML
SAPLRHVI_5250.HTML

Internet Application Component Book/Prebook Attendance

Service Name

The service name of this IAC is PV4I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this IAC. These objects should not be changed.

Development class	PP09
Transaction	PV4I
Function group for the screens	RHVI
Function modules	BAPI_BUS_EVENTGROUP_LIST
	BAPI_BUS_EVENTTYPE_LIST
	BAPI_BUS_EVENT_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_LANGUAGE
	BAPI_BUS_EVENT_LOCATION
	BAPI_BUEVENT_SCHEDULE
	BAPI_PREBOOK_ATTENDANCE
	BAPI_BOOK_ATTENDANCE
	BAPI_ATTENDEE_BOOK_LIST

Activities

Booking/Prebooking Attendance

Booking/Prebooking Attendance

1. On the initial screen, you can enter the following search criteria to restrict the business event catalog displayed:
 - a) The start and end date of the selection period for the business events.
 - b) The language in which the events are held.
 - c) The location of the business events.
2. Choose *Find*.

The system searches the event calendar and lists the tracks or themes that match the search criteria. The list is formatted as a table of contents.

To display all underlying event groups and types, choose *Expand all*.
3. Select a theme that interests you.

A list of the business event types in the selected track is displayed.
4. Select a business event type.

A list of business event dates, where available, is displayed. (This is indicated by an underlined event type.) If you want to make a booking for one of these dates, proceed as described in step 6.

If no suitable date is scheduled, you can choose *Prebook* by clicking the icon. Then choose *Confirm*.
5. Choose *Book* by clicking the icon beside the event date. A confirmation prompt appears. When you choose *Confirm*, you are booked for the event date.



Users can also access information about business events for which they are already booked or prebooked by choosing *Booked Events*.

Internet Application Component Booked Events

Use

The Internet Application Component *Booked Events* enables Web users to access information on bookings they have made for training courses or other business events offered by your company. Via the Internet, they can call up a list of business events they have already attended or events that they are booked or prebooked to attend. The user can also find out details such as event dates, contents, qualifications imparted, and attendance fees.

This IAC offers Web users a number of advantages. Users can access information on their own bookings or prebookings. Business event data administered in R/3 is presented attractively and is universally accessible. Users can save on costs communicating with the organizer by accessing the information themselves on the Internet. The data is always up-to-date.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

For more information on Internet Application Components, refer to [SAP Internet Applications \[Ext.\]](#).

Prerequisites

Authorizations/Security

Customers can implement different security measures for this application by adjusting the setup of system authorizations. All security measures are based on standard R/3 and R/3 Internet user authorizations.

Since the IAC *Booked Events* should be accessible to all R/3 users, you need to define a standard profile for the service, and assign a standard R/3 Internet user to each user.

You create an authorization profile for the global R/3 user of the IAC in Customizing for R/3 Basis under *Basis* → *Application Personalization* → *Menus and Authorizations* → *Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu*. The required authorization profile can then be generated from this single role.

Users of this application must be in possession of an R/3 Internet user ID to gain access to this application.

You generate this authorization by choosing the function *Internet user* (transaction SU05). Here you can create an Internet user for the Business Object Repository (BOR) object type **PDOTYPE_PT** and set an initial password.

For example, if you define such a user for an external person (object type H) with the object ID 00000055, you must make the following entries in transaction SU05:

ID: 01H 00000055 (the ID is made up of the plan version, the object type, and the object ID. It must exist as an object in *Training and Event Management*.)

Type: PDOTYPE_PT.

Once the user has accessed this application with this Internet user ID, he or she can display information on his or her bookings and prebookings.

Internet Application Component Booked Events

Standard Settings and Default Values

This IAC requires no special settings in Customizing for *Training and Event Management*.

To use the IAC *Booked Events*, you must create a business event catalog in the R/3 component *Training and Event Management*.



You can find detailed information on this under *Application Help* for *Training and Event Management*.

Features

Modification Options

The IAC *Booked Events* is output through the Internet Transaction Server (ITS). Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the IAC by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this IAC are as follows:

SAPLRHVI_2410.HTML

SAPLRHVI_2420.HTML

SAPLRHVI_2430.HTML

SAPLRHVI_2440.HTML

SAPLRHVI_5000.HTML

SAPLRHVI_5100.HTML

SAPLRHVI_5125.HTML

SAPLRHVI_5150.HTML

SAPLRHVI_5175.HTML

SAPLRHVI_5200.HTML

SAPLRHVI_5250.HTML

Service Name

The service name of this IAC is PV2I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

R/3 Development Objects

The following development objects are relevant for this IAC. These objects should not be changed.

Internet Application Component Booked Events

Development class	PP09
Transaction	PV2I
Function group for the screens	RHVI
Function modules	BAPI_ATTENDEE_BOOK_LIST
	BAPI_ATTENDEE_PREBOOK_LIST
	BAPI_COMPANY_BOOK_LIST
	BAPI_COMPANY_PREBOOK_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_SCHEDULE

Activities

[Displaying Booked Events \[Page 413\]](#)

Displaying Booked Events

Displaying Booked Events

1. On the initial screen, enter your own attendee ID and an attendee type for which you have authorization, a password, and choose *Logon*. A data screen appears.
2. You can restrict the search for bookings or prebookings by entering a selection period, consisting of a start and end date.



The default start date proposed is the current date. The default end date is automatically calculated by the R/3 System. You can overwrite both of these entries.

3. Choose *Find*.

A list of booked or prebooked business events that match the criteria is displayed in tabular form.



In the case of bookings, the system displays the actual event dates. In the case of prebookings, the business event type is displayed. The status feature lets you distinguish between event bookings and event type prebookings.

Internet Application Component Cancel Attendance

Use

The Internet Application Component (IAC) *Cancel Attendance* enables Web users to cancel bookings they have made via Internet for business events offered by your company. To do so, they access your calendar of events, find the relevant business event date for which they are booked and cancel the booking.

Event organizers can cancel attendance bookings made for their events. Users can save on costs communicating with the organizer by accessing and editing the information themselves on the corporate intranet.

For further information on the complete range of functions in *Training and Event Management*, see *Application Help*.

For more information on Internet Application Components, refer to [SAP Internet Applications \[Ext.\]](#).

Prerequisites

Authorizations/Security

Customers can implement different security measures for this application by adjusting the setup of system authorizations. All security measures are based on standard R/3 and R/3 Internet user authorizations.

Since the IAC *Cancel Attendance* should be accessible to all R/3 users, you need to define a standard profile for the service, and assign a standard R/3 Internet user to each user.

You create an authorization profile for the global R/3 user of the application in Customizing for R/3 Basis under *Basis → Application Personalization → Menus and Authorizations → Generate Role/Profile and Assign Users* by creating a new single role or changing an existing one. The single role must contain transaction PSV1 *Dynamic Attendance Menu* and transaction PV04 *Cancel Attendance*. The required authorization profile for the global R/3 user can then be generated from this single role.

Users of this application must be in possession of an R/3 Internet user ID to gain access to this application.

You generate this authorization by choosing the function *Internet user* (transaction SU05). Here you can create an Internet user for the Business Object Repository (BOR) object type **PDOTYPE_PT** and set an initial password.

For example, if you define such a user for an external person (object type H) with the object ID 00000055, you must make the following entries in transaction SU05:

ID: 01H 00000055 (the ID is made up of the plan version, the object type, and the object ID. It must exist as an object in *Training and Event Management*.)

Type: PDOTYPE_PT.

Once the R/3 Internet user has accessed this application with this Internet user ID, he or she can cancel bookings for business events.

Internet Application Component Cancel Attendance

Standard Settings and Default Values

This IAC requires no special settings in Customizing for *Training and Event Management*.

To use this IAC, you must create a business event catalog in the R/3 component *Training and Event Management*.



You can find detailed information on this under *Application Help* for *Training and Event Management*.

Features

Modification Options

The IAC *Cancel Attendance* is output through the Internet Transaction Server (ITS). Data is transferred from the R/3 System to the Internet server. Then the data is formatted and presented using an output template written in standard HTML format.

Your company can change the screen layout of the IAC by changing the HTML files on the Internet Transaction Server.

For example, you can determine which information is included in the screen layout, such as business event text and dates. This is achieved by turning certain fields on and off. You can also include your company's logo, change background colors, text colors and so on.

The HTML files for this IAC are as follows:

SAPLRHVI_2400.HTML
SAPLRHVI_2410.HTML
SAPLRHVI_2420.HTML
SAPLRHVI_2430.HTML
SAPLRHVI_2440.HTML
SAPLRHVI_2500.HTML
SAPLRHVI_2600.HTML
SAPLRHVI_5000.HTML
SAPLRHVI_5100.HTML
SAPLRHVI_5125.HTML
SAPLRHVI_5150.HTML
SAPLRHVI_5175.HTML
SAPLRHVI_5200.HTML
SAPLRHVI_5250.HTML

Service Name

The service name of this IAC is PV6I. You can find all the relevant data under this service name in the [SAP@WebStudio \[Ext.\]](#).

Internet Application Component Cancel Attendance

R/3 Development Objects

The following development objects are relevant for this IAC. These objects should not be changed.

Development class	PP09
Transaction	PV6I
Function group for the screens	RHVI
Function modules	BAPI_BUS_EVENTGROUP_LIST
	BAPI_BUS_EVENTTYPE_LIST
	BAPI_BUS_EVENT_LIST
	BAPI_BUS_EVENTTYPE_INFO
	BAPI_BUS_EVENT_INFO
	BAPI_BUS_EVENT_LANGUAGE
	BAPI_BUS_EVENT_LOCATION
	BAPI_BOOK_ATTENDANCE
	BAPI_ATTENDEE_BOOK_LIST
	BAPI_ATTENDEE_CANCEL

Activities

[Canceling Attendance \[Page 417\]](#)

Canceling Attendance

Canceling Attendance

5. Enter your attendee ID, the attendee type, your password and choose *Log on*. A data screen appears.
6. On the initial screen, you can enter the start and end date of the selection period for the business events to restrict the bookings displayed.
7. Choose *Find*.

A list of all your bookings and prebookings in the selection period is displayed. A trash can icon is displayed beside the bookings.

8. Select the business event you want to cancel and click the trash can icon for *Cancel*.

A window appears displaying the selected event again.

9. When you choose *Confirm* the cancellation is effected.



If you want to cancel processing, choose *Back*. The booking is then retained.

ALE Business Processes in Training and Event Management

ALE Business Processes in Training and Event Management

Training and Event Management has ALE-enabled interfaces with the following R/3 application components:

[Business Event Attendees: Contact Person \[Page 420\]](#)

[Business Event Attendees: Customer \[Page 422\]](#)

[Activity Allocation in Training and Event Management \[Page 424\]](#)

[Business Event Billing \[Page 439\]](#)

[Cost Transfer Posting in Training and Event Management \[Page 448\]](#)

[Material Order in Training and Event Management \[Page 455\]](#)

These standard business processes serve as examples of what objects and methods must be defined via the interfaces between the HR System *Training and Event Management* on the one hand, and the AC System *Cost Accounting* and the LO systems *Sales and Distribution* and *Materials Management* on the other hand if the data exchange between integrated systems is to function correctly.

See also:

[Integration Technology ALE \[Ext.\]](#)

Business Event Attendees: Contact Persons

Use

Data on contact persons i.e. customer employees that can be booked as event attendees in *Training and Event Management* can also be administered in the R/3 component *Sales and Distribution* (SD).

In this business process, data on contact persons is transferred from Logistics to the HR system via ALE. The transfer takes place synchronously via the RFC destination in Logistics. No IDOCs are transmitted during this process.

Integration

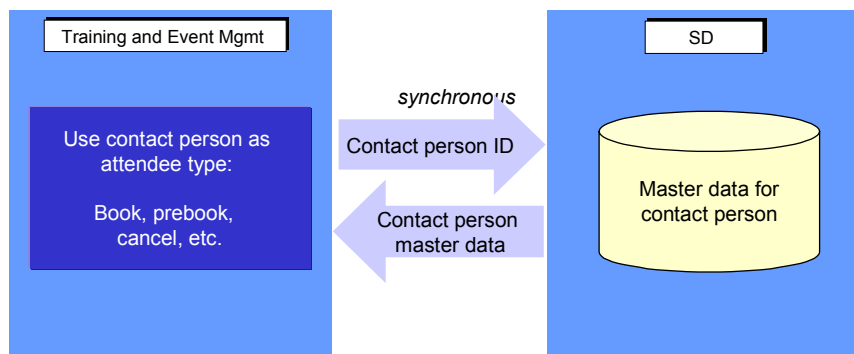
Functions in Training and Event Management

- Create, display, and change contact person attendee types by branching to *Sales and Distribution*.
- Prebook, book, cancel, rebook, and replace attendees of the type contact persons.
- Bill contact persons.
- Check existence of contact person.

Functions in Sales and Distribution

- Create, display, and change contact persons.
- Administer contact person master data.

Data Flow



The data transfer takes place using synchronous communication. In *Training and Event Management*, the interface program **RHPART00** reads all existing segments of object **BusPartnerEmployee** with the **BusinessPartnerEmployee.ExistenceCheck** method in *Sales and Distribution*.

Business Event Attendees: Contact Persons**Prerequisites**

When specifying the object method, you must define the HR system as the sending system and the Logistics system as the receiving system.

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

CLIENT: HR System

SERVER: Logistics System

OBJECT: BusPartnerEmployee

OBJECT TYPE: BUS1006001

METHOD: BusinessPartnerEmployee.ExistenceCheck



You can find additional information on the ALE business process *Business Event Attendees: Contact Persons* in the IMG under [Business Event Attendee: Set Contact Person \[Ext.\]](#).

Business Event Attendees: Customers

Use

Data on customers that can be booked as business event attendees in *Training and Event Management* is administered in the R/3 component *Sales and Distribution (SD)*.

In this business process, customer data is transferred from Logistics to the HR system via ALE. The transfer takes place synchronously via the RFC destination in Logistics.

Integration

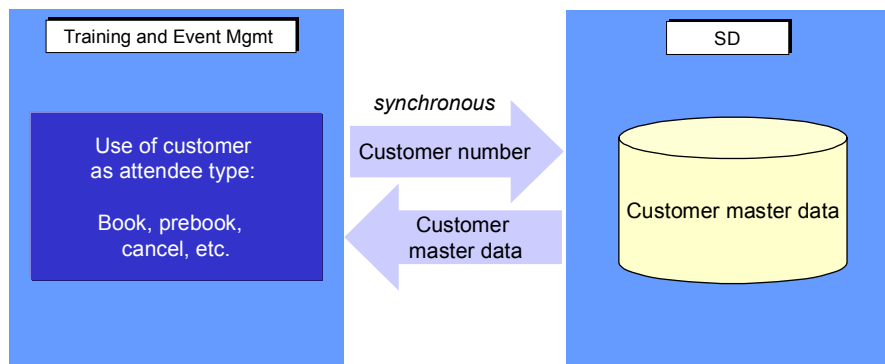
Functions in Training and Event Management

- Create, display, and change customer attendee types by branching to *Sales and Distribution*.
- Prebook, book, cancel, rebook, and replace customers.
- Bill customers.
- Check existence of customer.

Functions in Sales and Distribution

- Create, display, and change customers.
- Administer customer data.

Data Flow



The data transfer takes place using synchronous communication. In *Training and Event Management*, the interface program **RHKUNA00** reads all existing segments in the **Customer** object with the **Customer.CheckExistence** method in *Sales and Distribution*.

Prerequisites

When specifying the object method, you must define the HR system as the sending system and the Logistics system as the receiving system.

Business Event Attendees: Customers

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

CLIENT: HR System

SERVER: Logistics System

OBJECT: Customer

OBJECT TYPE: KNA1

METHOD: Customer.CheckExistence



You can find additional information on the ALE business process *Business Event Attendees: Customers* in the IMG under [Business Event Attendee: Set Customer \[Ext.\]](#).

Activity Allocation in Training and Event Management

Use

The interface *Activity Allocation in Training and Event Management* lets you settle attendance fees and instructor functions for internal employees from *Training and Event Management* in a central *Controlling System* (CO).

This business process can be implemented in the following variants:

- [Activity Allocation in Training and Events: Attendance Fees \[Page 425\]](#)
- [Activity Allocation in Training and Events: Instructor Function \[Page 432\]](#)

Activity Allocation in Training and Events: Attendance Fees

Activity Allocation in Training and Events: Attendance Fees

Use

The interface *Activity Allocation in Training and Event Management* lets you internally allocate attendance fees for your employees from *Training and Event Management* to a central *Cost Accounting System (CO)*.

Integration

Functions in Training and Event Management

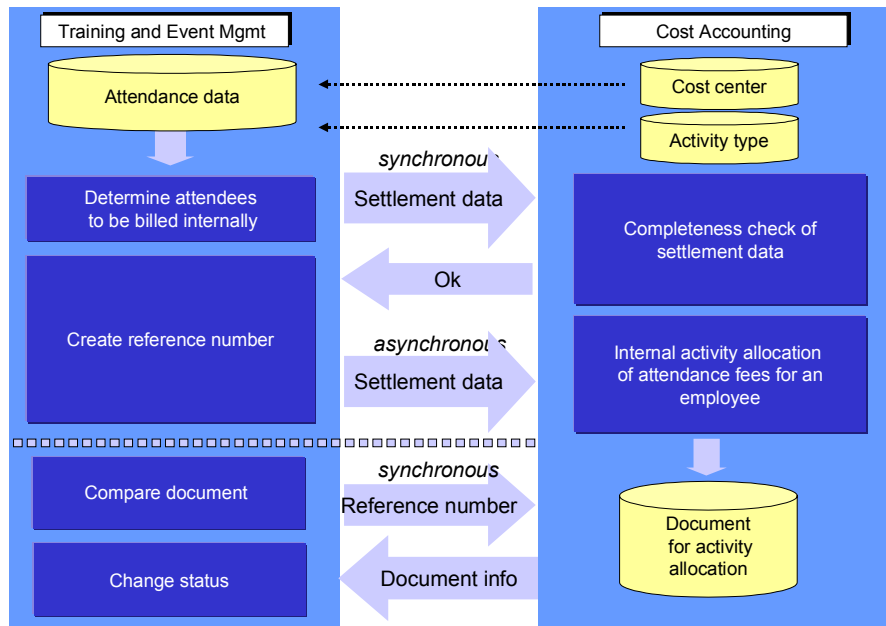
- Determine the internal attendees (employees) to be billed for event attendance
- Transfer settlement data to the CO system
- Create a reference number for the activity allocation
- Compare document i.e. check activity allocation
- Request report for already-performed activity allocation of attendance fees
- Cancel document

Functions in Cost Accounting

- Check completeness of settlement data transferred from *Training and Event Management*
- Allocate attendance fees internally
- Transmit document information for document comparison with *Training and Event Management*

Activity Allocation in Training and Events: Attendance Fees

Data Flow



- In *Training and Event Management*, report **RHINLV00** determines which attendees are to be allocated internally. Settlement data is transmitted to *Cost Accounting (CO)*. A completeness check is carried out for the data. This data transfer is realized using synchronous communication.
- If the result of the check is positive, a reference number is created in *Training and Event Management* and the settlement data is transferred to *Cost Accounting* via asynchronous communication.
- In *Cost Accounting*, the internal allocation for the transferred attendee is performed, and a billing document is created.
- A document comparison is performed in *Training and Event Management* whereby the reference number is transmitted to *Cost Accounting*. The document information is returned to TEM from CO (using synchronous communication).

Prerequisites

- The cost centers and activity types must be distributed.
- The customer distribution model must be maintained. When you are specifying the object method, you must define the HR system as the sending system and the CO system as the receiving system.

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

CLIENT: HR System

SERVER: CO System

Activity Allocation in Training and Events: Attendance Fees

OBJECT: AcctngActivityAlloc

METHOD: Post

OBJECT: AcctngActivityAlloc

METHOD: Check

OBJECT: ControllingDocument

METHOD: FindDetails

You can generate the [partner profile \[Ext.\]](#) from the distribution model. For more information, refer to the ALE-IMG under [Generate Partner Profile \[Ext.\]](#).



You can find more information on the ALE business process *Activity Allocation in Training and Event Management* in the IMG under [Set activity allocation in Training and Event Management \[Ext.\]](#).

See also:

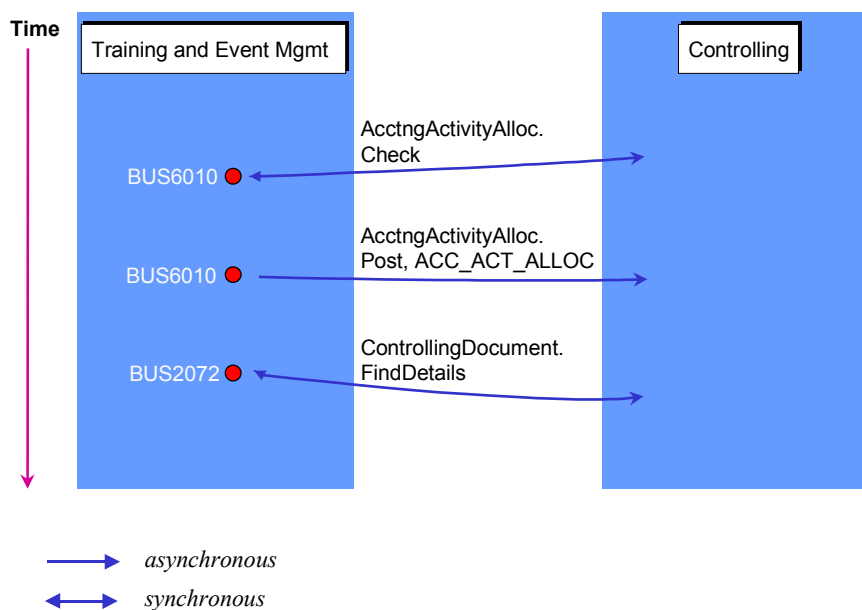
[Business Process Flow of Activity Allocation for Attendance Fees \[Page 428\]](#)

Business Process Flow of Activity Allocation for Attendance Fees

Purpose

You can use this ALE business process variant to allocate attendance fees for your employees from *Training and Event Management* to a central *Controlling System*.

Process Flow



1. Performing Activity Allocation: Attendance Fees

a) Check settlement data for completeness:

Business object: AcctngActivityAlloc

Object type: BUS6010

Method: Check

b) Perform activity allocation:

Business object: AcctngActivityAlloc

Object type: BUS6010

Method: Post

2. Checking Activity Allocation: Attendance Fees

a) Perform a billing document comparison for the internal activity allocation of attendance fees:

Business Process Flow of Activity Allocation for Attendance Fees

Business object: ControllingDocument

Object type: BUS2072

Method: FindDetails

See also:

[Performing Activity Allocation: Attendance Fees \[Page 430\]](#)

[Checking Activity Allocation: Instructor Function \[Page 431\]](#)



Performing Activity Allocation: Attendance Fees

Use

The procedure of report RHINLV00 (or RHXINLV0) describes how to settle costs internally for attendance fees from *Training and Event Management* to *Cost Accounting* via the ALE interface.

You can also use the report to evaluate activity allocations that have already been performed. To do so, you simply enter the required reporting period and select the list output parameters.


Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu* choose *Human Resources* → *Training and Events* → *Business Events* → *Activity Allocation* → *Attendance*. The system displays the selection screen of report RHXINLV0.
2. On the selection screen, enter the ID of the business event for which you want to perform internal activity allocation.
3. Specify the document date and the posting date.
4. Choose .
5. Choose . The system checks synchronously whether the settlement data is complete.

Interfaces

Business object	Method
AcctngActivityAlloc	Check

If data is missing, an error log is output. You can use this to add missing data. The attendee is locked for activity allocation until you enter the missing data.

6. Choose  *Allocation*. Using asynchronous communication, *Training and Event Management* transmits the complete settlement data to *Cost Accounting*, where attendance fees are allocated internally.

Interfaces

Business object	Method	Message category	IDoc-
AcctngActivityAlloc	Post	ACC_ACT_ALLOC	ACC_ACT_ALLOC02

A reference document number is created in *Training and Event Management*.

See also:


[Checking Activity Allocation: Attendance Fees \[Page 431\]](#)

Checking Activity Allocation: Attendance Fees

Checking Activity Allocation: Attendance Fees

Procedure

To check the activity allocation status:

1. If you do not find yourself in the report's list output after you have performed the activity allocation, restart report RHXINLV0 or RHINLV00. Make the same entries as you made in the first report but this time under *List output*, choose *already allocated* (attendees).
2. Choose . The report output screen appears.
3. Select the reference number of the activity allocation that you want to check and choose *Compare document*. The system synchronously determines the activity allocation status.

Interfaces

Business object	Method
ControllingDocument	FindDetails

If the activity allocation was successfully performed in *Cost Accounting*, the system displays the document information from *Cost Accounting*.

If errors occur, you can display the document flow and an error log, which you can use to rectify the problem before restarting activity allocation.

Activity Allocation in Training and Events: Instructor Function

Use

The interface *Activity Allocation in Training and Event Management* lets you settle costs for instructor functions carried out by your employees from *Training and Event Management* in a central *Cost Accounting* system (CO).

Integration

Functions in Training and Event Management

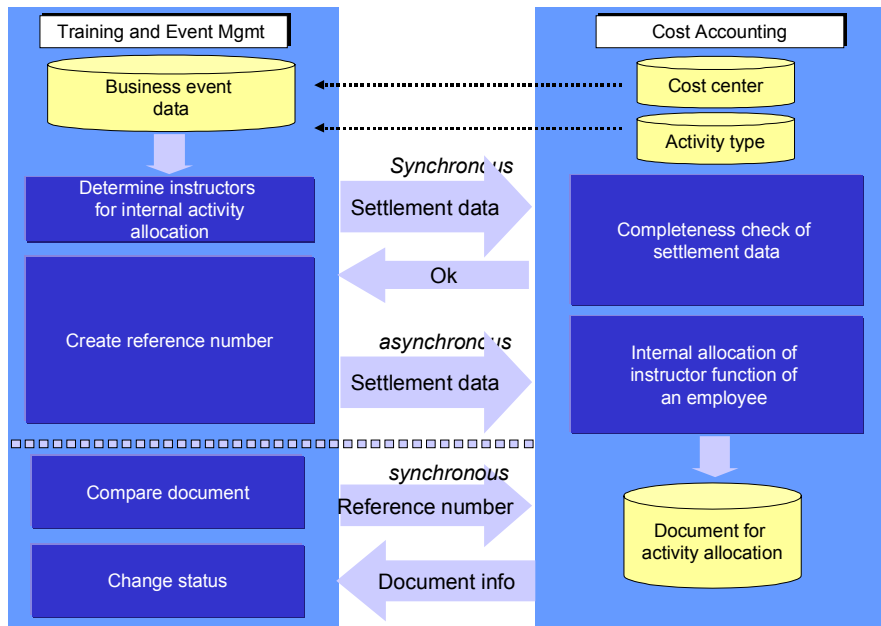
- Determine the instructors costs to be internally allocated
- Transfer settlement data to the CO system
- Create a reference number for the activity allocation
- Compare document i.e. check activity allocation
- Request report for already-performed activity allocation for instructors
- Cancel document

Functions in Cost Accounting

- Check completeness of settlement data transferred from *Training and Event Management*
- Allocate instructor function costs internally
- Transmit document information for document comparison with *Training and Event Management*

Activity Allocation in Training and Events: Instructor Function

Data Flow



- In *Training and Event Management*, report **RHINLV10** determines what instructors are to be allocated internally. Settlement data is transmitted to *Cost Accounting (CO)*. A completeness check is carried out for the data. This data transfer is realized using synchronous communication.
- If the result of the check is positive, a reference number is created in *Training and Event Management* and the settlement data is transferred to *Cost Accounting* via asynchronous communication.
- In *Cost Accounting*, internal allocation is performed for the transferred instructor, and a billing document is created.
- A document comparison is performed in *Training and Event Management* whereby the reference number is transmitted to *Cost Accounting*. The document information is returned to TEM from CO (using synchronous communication).

Prerequisites

- Release 4.5 A. or higher of *Training and Event Management* and Release 4.0A or higher of *Cost Accounting*.
- The cost centers and activity types must be distributed.
- The customer distribution model must be maintained. When you are specifying the object method, you must define the HR system as the sending system and the CO system as the receiving system.

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

Activity Allocation in Training and Events: Instructor Function

CLIENT: HR System

SERVER: CO System

OBJECT: AcctngActivityAlloc

METHOD: Post

OBJECT: AcctngActivityAlloc

METHOD: Check

OBJECT: ControllingDocument

METHOD: FindDetails

You can generate the [partner profile \[Ext.\]](#) from the distribution model. For more information, refer to the ALE-IMG under [Generate Partner Profile \[Ext.\]](#).



You can find more information on the ALE business process *Activity Allocation in Training and Event Management* in the IMG under [Set activity allocation in Training and Event Management \[Ext.\]](#).

See also:

[Business Process Flow of Activity Allocation for Instructors \[Page 435\]](#)

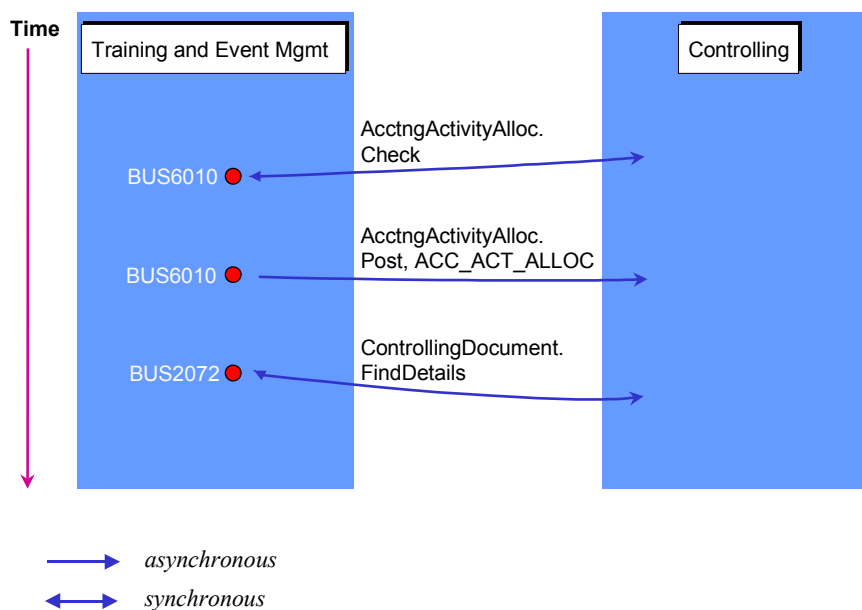
Business Process Flow of Activity Allocation for Instructors

Business Process Flow of Activity Allocation for Instructors

Purpose

This ALE business process variant lets you settle costs for the instructor activities of your employees recorded in *Training and Event Management* in a central *Controlling System* (CO).

Process Flow



1. Performing Activity Allocation for Instructor Functions

a) Check settlement data for completeness:

Business object: AcctngActivityAlloc

Object type: BUS6010

Method: Check

b) Perform activity allocation:

Business object: AcctngActivityAlloc

Object type: BUS6010

Method: Post

2. Checking activity allocation for instructor functions

a) Compare documents for the internal activity allocation of instructor functions:

Business Process Flow of Activity Allocation for Instructors

Business object: ControllingDocument

Object type: BUS2072

Method: FindDetails

See also:

[Performing Activity Allocation: Instructor Function \[Page 437\]](#)

[Checking Activity Allocation: Instructor Functions \[Page 438\]](#)

Performing Activity Allocation: Instructor Function

Performing Activity Allocation: Instructor Function

Procedure

To allocate instructor costs for internal employees in *Training and Event Management*:

1. On the *SAP Easy Access* screen, choose *Human Resources* → *Training and Events* → *Business Events* → *Activity Allocation* → *Instructor Function*. The system displays the selection screen of report RHINLV10.
2. Enter the object ID of the business event for whose instructors you want to perform activity allocation. Alternatively, enter the instructor and the document date directly. Choose *Execute*.



The default date proposed for the document is the current date.

You can also use the report to evaluate activity allocations that have already been performed. To do so, you simply enter the required reporting period and select the list output parameters.

3. Choose *Check document*. The system checks synchronously whether the settlement data is complete.

Interfaces

Business object	Method
AcctngActivityAlloc	Check

If data is missing, an error log is output. You can use this to add missing data. The instructor is locked for activity allocation until you enter the missing data.

4. Choose *Create activity allocation*. Using synchronous communication, *Training and Event Management* transfers the complete settlement data to *Cost Accounting* where the instructor costs are settled internally.

Interfaces

Business object	Method	Message category	IDoc-
AcctngActivityAlloc	Post	ACC_ACT_ALLOC	ACC_ACT_ALLOC02

A reference document number is created in *Training and Event Management*.

See also:

[Checking Activity Allocation: Instructor Function \[Page 438\]](#)

Checking Activity Allocation: Instructor Function

Procedure

To check the activity allocation status:

1. If you do not find yourself in the report's list output after you have performed the activity allocation, restart report RHINLV10. Make the same entries as you made for the first report, but this time, under *List output*, choose *Already allocated* (instructors).
2. Select the reference number of the activity allocation that you want to check and choose *Compare document*. The system synchronously determines the activity allocation status.

Interfaces

Business object	Method
ControllingDocument	FindDetails

If the activity allocation was successfully performed in *Cost Accounting*, the system displays the document information from *Cost Accounting*.

If errors occur, you can display the document flow and an error log, which you can use to rectify the problem before restarting activity allocation.

Business Event Billing

Business Event Billing

Use

The *Billing Business Events* interface lets you bill attendance fees from *Training and Event Management* to *Sales and Distribution* (SD). Data is transferred synchronously. No IDOCs are sent.

Integration

Functions in Training and Event Management

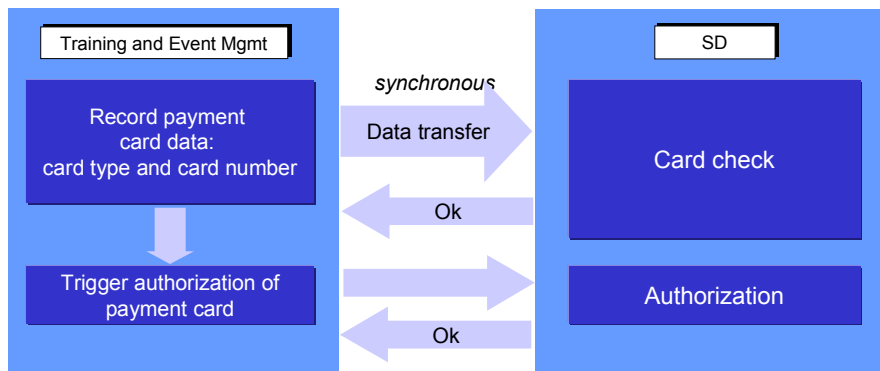
- Transfer card data to SD system if you use payment cards for billing
- Authorize payment card if check is passed successfully
- Determine the attendees to be billed for an event
- Transfer payroll data to the SD system
- Create a reference document for billing
- Compare document, i.e. checking billing
- Report on completed billing
- Check whether billing has been canceled
- Cancel billing documents
- Create credit memos
- Cancel credit memos

Functions in Sales and Distribution

- Check card if payment cards are used in billing
- Check completeness of billing data transferred from *Training and Event Management*
- Bill attendance fees
- Transmit document information for document comparison with *Training and Event Management*

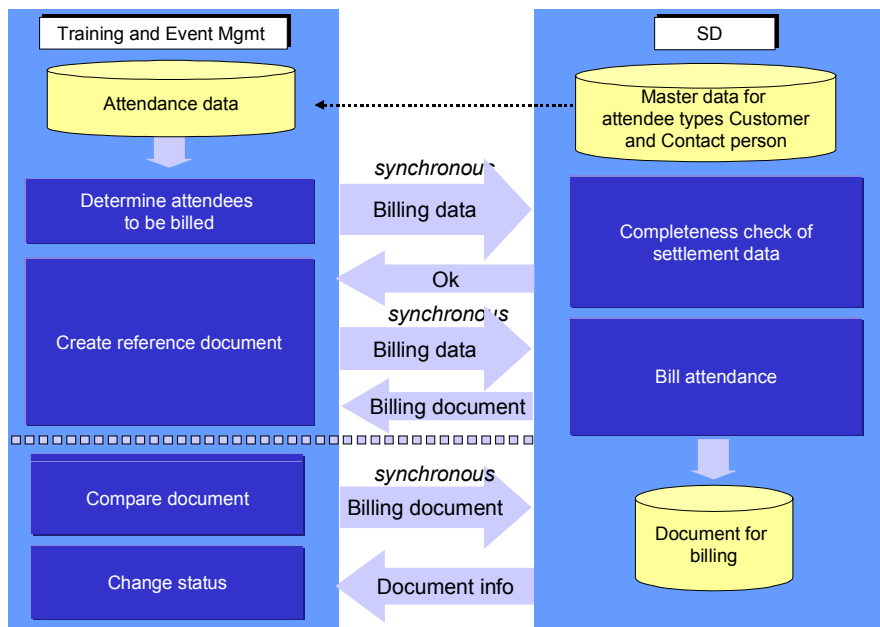
Data Flow

Payment card check:



- When payment cards are used in the billing process, payment card data is stored in *Training and Event Management* during fee assignment (function *Book attendance* in the dialog *Book/Payment Info*). This data is transferred to *Sales and Distribution*, where a plausibility check is performed on the data. The result of this check is transferred to *Training and Event Management*. This data transfer takes place using synchronous communication. If the check validates the card, the card can be authorized in *Sales and Distribution*.

Perform billing:

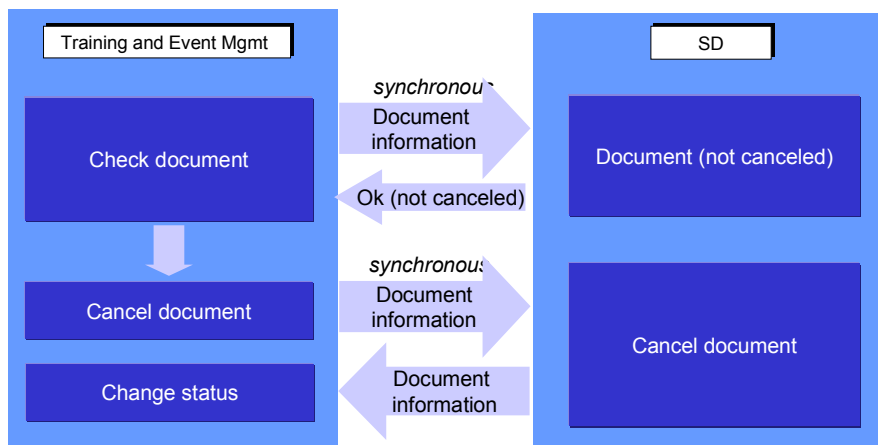


- In *Training and Event Management*, the report **RHFAKT00** determines what attendees are to be billed. The settlement data is transferred to *Sales and Distribution* where a completeness check is performed. This data transfer is realized using synchronous communication.

Business Event Billing

- In *Training and Event Management*, if there is a positive check result, a reference document is created and the settlement data is transferred to *Sales and Distribution*, via synchronous communication.
- In *Sales and Distribution*, billing is performed for the transferred attendees.
- In *Sales and Distribution*, a document comparison is performed, in which the reference number is transmitted to *Sales and Distribution*. Document information is sent back to *Training and Event Management* from *Sales and Distribution* (via synchronous communication).

Cancel billing document:

**Prerequisites**

- The sales organization data must be distributed, i.e. *sales organization*, *distribution channel*, and *division*.
- The customer distribution model must be maintained. When you are specifying the object method, you must define the HR system as the sending system and the SD system as the receiving system.

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

CLIENT: HR System

SERVER: SD System

OBJECT: PaymentCardServices

METHOD: Checknumber

OBJECT: ItCustBillingDoc

METHOD: CreateFromData

OBJECT: ItCustBillingDoc

METHOD: Simulate

OBJECT: ItCustBillingDoc

METHOD: IsCancelled

OBJECT: ItCustBillingDoc

METHOD: CancelFromData



It is planned to support the methods for object ItCustBillingDoc for one more release only.



You can find more information on the ALE business process *Billing in Training and Event Management* in the IMG under [Set Up Billing for Business Events \[Ext.\]](#).

See also:

[Business Process Flow of Billing Business Events \[Page 443\]](#)

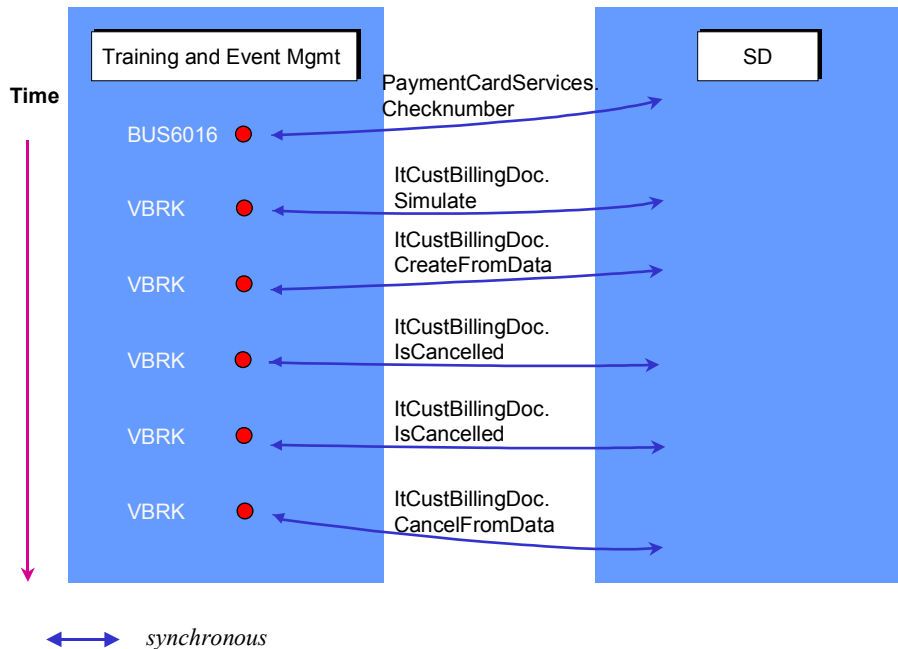
Business Process Flow of Billing Business Events

Business Process Flow of Billing Business Events

Purpose

You can use this ALE business process to bill attendance fees accrued in *Training and Event Management* to *Sales and Distribution* (SD).

Process Flow



1. Checking payment card
 Business object: PaymentCardServices
 Object type: BUS6016
 Method: Checknumber
2. Billing attendance fees
 - a) Check settlement data for completeness:
 Business object: ItCustBillingDoc
 Object type: VBRK
 Method: Simulate
 - b) Carry out billing activity:
 Business object: ItCustBillingDoc
 Object type: VBRK

Business Process Flow of Billing Business Events

Method: CreateFromData

3. Checking billing of attendance fees

Carry out document comparison for billing:

Business object: ItCustBillingDoc

Object type: VBRK

Method: IsCancelled

4. Canceling Billing Documents

a) Check whether billing document has been canceled already:

Business object: ItCustBillingDoc

Object type: VBRK

Method: IsCancelled

b) Cancel billing document:

Business object: ItCustBillingDoc

Object type: VBRK

Method: CancelFromData

See also:

[Performing Business Event Billing \[Page 445\]](#)

[Checking Billing of Business Events \[Page 446\]](#)

[Canceling Billing Documents \[Page 447\]](#)

Performing Business Event Billing

Performing Business Event Billing

Procedure

To carry out billing for attendance fees in *Training and Event Management*:

1. On the *SAP Easy Access* screen, choose *Human Resources* → *Training and Events* → *Business Events* → *Billing*. The selection screen of the billing report RHFAKT00 appears.
2. Enter the object ID of the business event for which you want to bill fees, the billing document date, and choose *Execute*.



The system automatically proposes the current date as the billing document date.

You can also use the report for billing that has already been carried out. To do so, you simply enter the required reporting period and select the list output parameters.

The *Training and Event Management* System determines what attendees have to be billed for the business event selected.

3. Choose *Check/Simulation*. The *Training and Event Management* System transfers the billing data synchronously to the *Sales and Distribution* System, where it is checked for completeness.

Interfaces

Business object	Method
ItCustBillingDoc	Simulate

If billing data is missing, an error log is output which you can use to maintain the missing data. Billing is locked for this attendance booking until errors have been corrected.

4. Choose *Create billing document*. The *Training and Event Management* system creates a reference document and transfers the complete billing data to *Sales and Distribution* where billing is executed. Billing data is returned to the *Training and Event Management* system. This data transfer is realized using synchronous communication.

Interfaces

Business object	Method
ItCustBillingDoc	CreateFromData

See also:

[Checking Billing of Business Events \[Page 446\]](#)

[Canceling a Billing Document \[Page 447\]](#)

Checking Billing of Business Events

Procedure

To check the billing status:

1. Restart the *Billing Business Events* report (RHFAKT00) if you are not on the report list output screen after the billing has been carried out. Make the same entries as you made in the first report but this time under *List output*, choose *already billed* (attendees).
2. Place the cursor on the billing reference number or invoice number that you want to check, and choose *Compare document*. The system synchronously determines the billing status.

Interfaces

Business object	Method
ItCustBillingDoc	IsCancelled

If the billing was successfully performed, the system will display the document information from *Sales and Distribution*.

If errors occur, you can display the document flow and an error log, which you can use to rectify the error and, if necessary, start the billing process again.

[Canceling Billing Documents \[Page 447\]](#)

Canceling Billing Documents

Canceling Billing Documents

Procedure

To cancel a billing document:

3. Restart the *Billing Business Events* report (RHFAKT00) if you are not on the report list output screen after the billing has been carried out. Make the same entries as you made in the first report but this time under *List output*, choose *already billed* (attendees).
4. Place the cursor on the document reference number and choose *Extras* → *Cancel billing document*. The system checks whether the document has already been canceled, and cancels the document if this has not already been done. These data transfers take place using synchronous communication.

Interfaces

Business object	Method
ItCustBillingDoc	IsCancelled
ItCustBillingDoc	CancelFromData

Cost Transfer Posting in Training and Event Management

Use

The interface *Cost Transfer Posting in Training and Event Management* lets you transfer business event costs from the *Training and Event Management* component to a *Cost Accounting* system (CO).

Integration

Functions in Training and Event Management

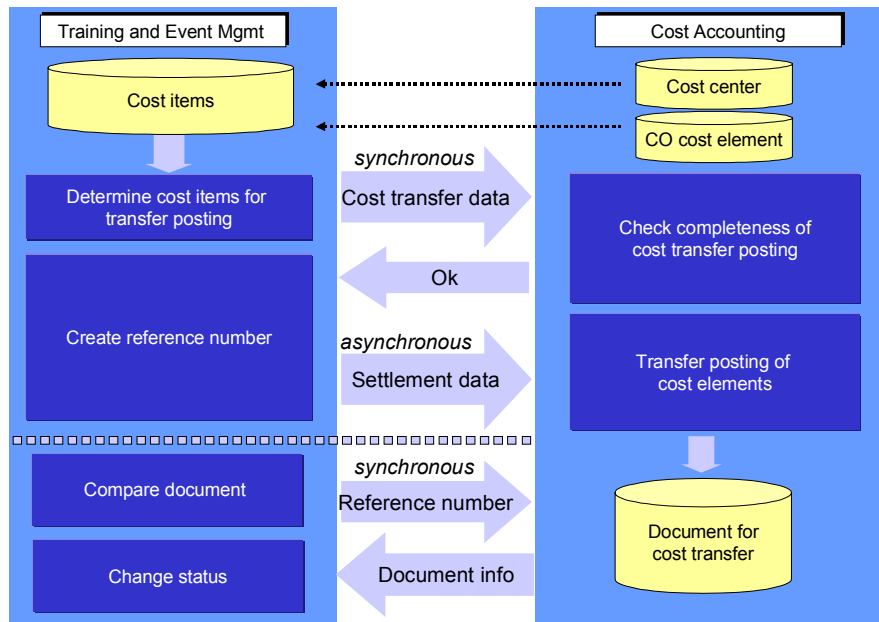
- Determine business event costs
- Determine cost items to be transferred
- Transmit cost transfer data to CO
- Create a reference number for cost transfer posting
- Compare documents, that is, check the transfer posting
- Cancel document

Functions in Cost Accounting

- Check completeness of data transmitted from *Training and Event Management*
- Transfer posting of cost items of business events
- Transmit document information for document comparison with *Training and Event Management*

Cost Transfer Posting in Training and Event Management

Data Flow



- In *Training and Event Management (TEM)*, the report **RHCCOS00** is used to determine what cost items have to be transferred. Settlement data is transmitted to *Cost Accounting (CO)*. A completeness check is carried out for the data. This data transfer is realized using synchronous communication.
- If the result of the check is positive, a reference number is created in *Training and Event Management* and the settlement data is transferred to *Cost Accounting* via asynchronous communication.
- In *Cost Accounting*, the transfer posting is performed for the cost items. This generates a document.
- A document comparison is performed in *Training and Event Management* whereby the reference number is transmitted to *Cost Accounting*. The document information is returned to TEM from CO (using synchronous communication).

Prerequisites

- Cost centers and CO cost elements must be distributed.
- The customer distribution model must be maintained. When you are specifying the object method, you must define the HR system as the sending system and the CO system as the receiving system.

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

CLIENT: HR System

SERVER: CO System

Cost Transfer Posting in Training and Event Management

OBJECT: AcctngRepostPrimaryCosts

METHOD: Post

OBJECT: AcctngRepostPrimaryCosts

METHOD: Check

OBJECT: ControllingDocument

METHOD: FindDetails

You can generate the [partner profile \[Ext.\]](#) from the distribution model. For more information, refer to the ALE-IMG under [Generate Partner Profile \[Ext.\]](#).



You can find more information on the ALE business process *Cost Transfer Posting in Training and Event Management* in the IMG under [Set Cost Transfer Posting in Training and Event Management \[Ext.\]](#).

See also:

[Business Process Flow of Cost Transfer Posting in Training and Event Management \[Page 451\]](#)

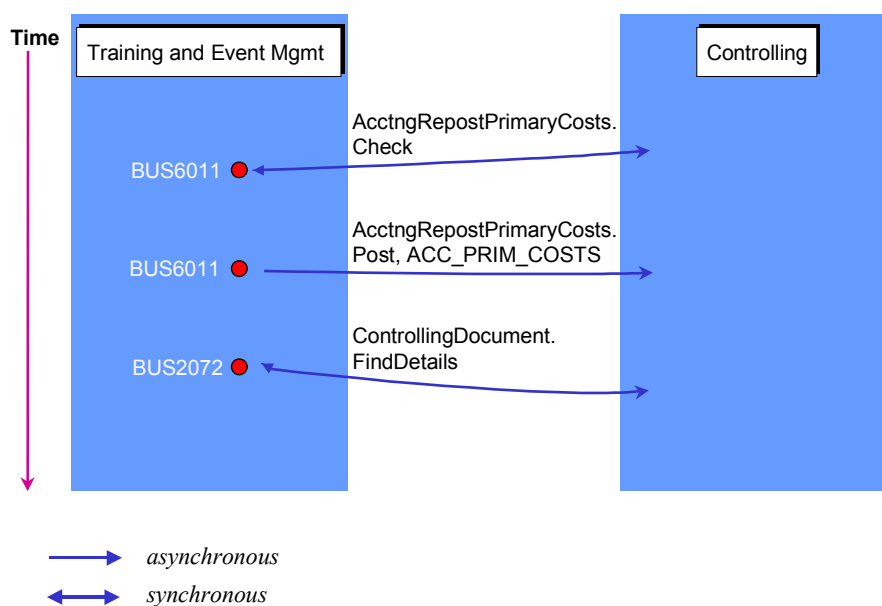
Business Process Flow of Transfer Posting of Event Costs

Business Process Flow of Transfer Posting of Event Costs

Purpose

You can use this ALE business process to transfer business event costs from *Training and Event Management* to a *Cost Accounting* system.

Process Flow



1. Performing cost transfer posting of cost items
 - a) Check settlement data for completeness:

Business object: AcctngRepostPrimaryCosts
Object type: BUS6011
Method: Check
 - b) Post costs:

Business object: AcctngRepostPrimaryCosts
Object type: BUS6011
Method: Post
2. Checking cost transfer posting of cost items
 - a) Carry out document comparison for cost transfer:

Business Process Flow of Transfer Posting of Event Costs

Business object: ControllingDocument

Object type: BUS2072

Method: FindDetails

See also:

[Performing Cost Transfer \[Page 453\]](#)

[Checking Cost Transfer Posting \[Page 454\]](#)

Performing Cost Transfer Posting

Performing Cost Transfer Posting

Use

To perform cost transfer posting in *Training and Event Management*:

5. On the *SAP Easy Access* screen, choose *Human Resources* → *Training and Events* → *Business Events* → *Cost Transfer Posting*. The selection screen of report RHCCOS00 appears.
6. Enter the business event ID for which you want to transfer costs. Choose *Execute*.



The default date proposed for the document is the current date.

You can also use the report to evaluate cost transfer postings that have already been performed. To do so, you simply enter the required reporting period and select the list output parameters.

7. Choose *Check document*. The system checks synchronously whether the settlement data is complete.

Interfaces

Business object	Method
AcctngRepostPrimaryCosts	Check

If data is missing, an error log is output. You can use this to add missing data. You cannot post costs until errors have been corrected.

8. Choose *Create cost transfer*. The *Training and Event Management* system transfers all settlement data via asynchronous communication to Cost Accounting, where cost transfer posting is performed for the business event costs.

Interfaces

Business object	Method	Message category	IDoc-
AcctngRepostPrimaryCosts	Post	ACC_PRIM_COSTS	ACC_PRIM_COSTS01

A reference document number is created in *Training and Event Management*.

See also:

[Checking Cost Transfer Posting \[Page 454\]](#)

Checking Cost Transfer Posting

Procedure

To check the status of cost transfer posting:

3. Start the report RHCCOS00 again if you are not on the list output screen of the report after executing cost transfer posting. Make the same entries as before.
4. Place the cursor on the reference number of the cost transfer posting you want to check and choose *Compare document*. The system determines the status synchronously.

Interfaces

Business object	Method
ControllingDocument	FindDetails

If cost transfer posting was executed successfully in *Cost Accounting*, the document information is displayed.

If there were errors, you can display the document flow and the error log. You can use the log to correct errors and start cost transfer posting again.

Material Order in Training and Event Management

Use

The interface *Material as a Resource in Training and Event Management* lets users of *Training and Event Management* reserve resources that are managed as material in the *Materials Management* (MM) application component.

A *reservation* is created for stock material if it is available. A *purchase requisition* is created in *Purchasing* for non-stock material or material that is not currently available.

Integration

Functions in Training and Event Management

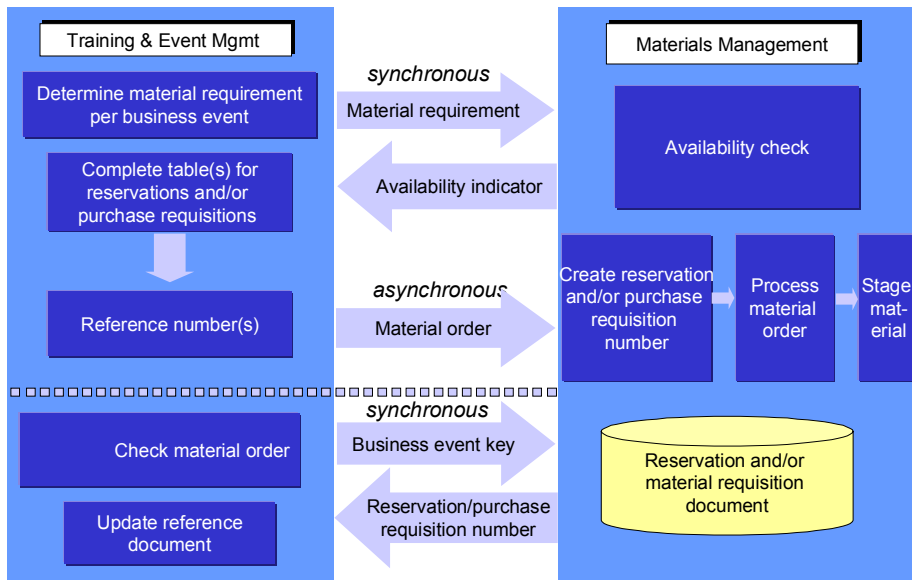
- Select and reserve material for a business event
- Determine the demand for a material for a business event
- Transmit demand to *R/3 Materials Management*
- Create a reference number for material reservation and/or purchase requisition
- Order material (transfer material reservation or purchase requisition)
- Check material order

Functions in Materials Management

- Check availability of material
- Create material reservation or purchase requisition
- Transmit material purchase requisition to *Purchasing*
- Stage material
- Transmit reservation or purchase requisition number

Material Order in Training and Event Management

Data Flow



- In *R/3 Training and Event Management*, the report **RHMARP00** is used to determine the material requirements of a business event and transmit these to *R/3 Materials Management*. An availability check is carried out for the required material and an availability indicator is transmitted to *R/3 Training and Event Management*. This data transfer is realized using synchronous communication.
- In *R/3 Training and Event Management*, either a reservation or a purchase requisition is created depending on the availability indicator. This process generates either one or two reference numbers.
- Material data is transmitted using asynchronous communication to *R/3 Materials Management*, where a material reservation or a purchase requisition is created. The reservation or purchase requisition is further processed until the material is available.
- During material order checking (report RHMARP00), a check is carried out in *R/3 Materials Management* for the reservation or purchase requisition number using the business event key and the reference number is returned to *Training and Event Management* (via synchronous communication).

Prerequisites

- Release 4.5A or higher of both *Training and Event Management* and *Materials Management* since the material order was not supported in previous releases.
- In distributed systems, the customer distribution model must be maintained. This means that the HR System must be defined as the sending system and Logistics as the receiving system during object method specification.

Material Order in Training and Event Management

The following entries must be made in ALE Customizing in the step [Maintain Distribution Model and Distribute Views \[Ext.\]](#) under *Maintain method*:

CLIENT: HR System

SERVER: Logistics System

OBJECT: Material

METHOD: GetList

OBJECT: MaterialReservation

METHOD: CreateFromData

OBJECT: Purchase Requisition

METHOD: CreateFrom Data

You can generate settings for the [Partner Profiles \[Ext.\]](#) from the distribution model. For more information, refer to the ALE IMG under [Generate Partner Profiles \[Ext.\]](#).



For more information on the ALE business process *Material as a Resource in Training and Event Management*, refer to the Implementation Guide (IMG) under [Set Material as a Resource in Training and Event Management \[Ext.\]](#).

See also:

[Business Process Flow of Material Order \[Page 458\]](#)

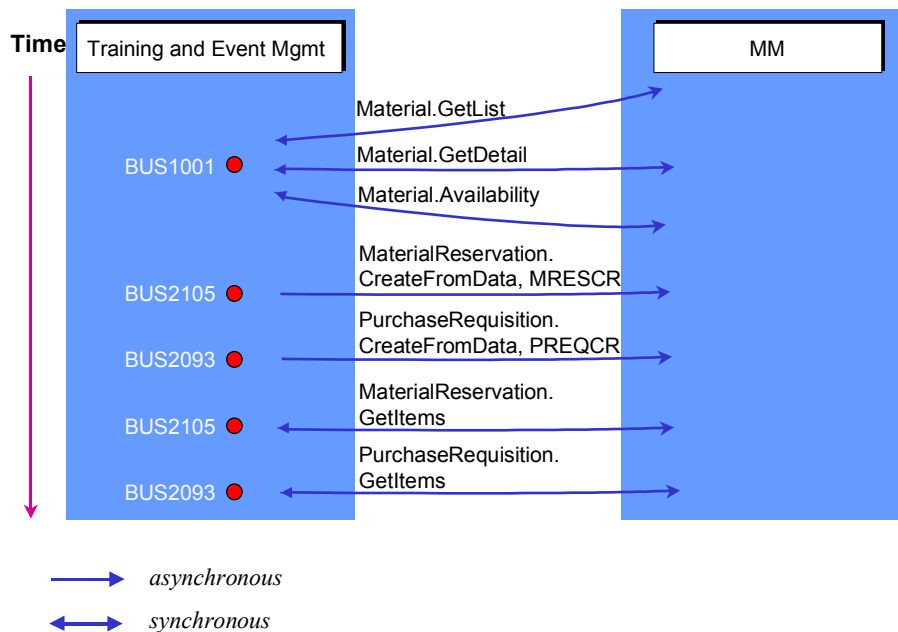
Business Process Flow of Material Order

Purpose

You can use these ALE business processes in *Training and Event Management* to order material required for holding business events from *Materials Management*. You can generate a reservation for material that is in stock or a purchase requisition for material that is not currently in stock.

In *Training and Event Management*, you can monitor and check the material order operation.

Process Flow



1. Generating material order

a) Read material master data:

Business object: Material

Object type: BUS1001

Methods: GetList and GetDetail

b) Determine availability indicator of material:

Business object: Material

Object type: BUS1001

Method: Availability

c) Trigger material reservation and/or purchase requisition:

Business Process Flow of Material Order

Business objects: Material Reservation and PurchaseRequisition

Object types: BUS2105 and BUS2093

Method: CreateFromData

2. Checking Material Order

a) Check material reservation and/or purchase requisition:

Business objects: Material Reservation and PurchaseRequisition

Object types: BUS2105 and BUS2093

Method: GetItems

See also:

[Ordering Material \[Page 460\]](#)

[Checking Material Order \[Page 461\]](#)

Ordering Material

Procedure

To order material for a business event in *Training and Event Management*:

1. On the *Training and Event Management* main screen, choose the dynamic *Information* menu and start the report RHMARP00 (*Material Requirements per Business Event*) from the list of reports available for business events.
2. Enter the business event ID, the reporting period and choose *Execute*.

The system reads the material master in *Materials Management* synchronously.

Interfaces

Business object	Method
Material	GetList
Material	GetDetail

3. Choose *Reserve Material*. The system checks availability of the required material synchronously.

Interfaces

Business object	Method
Material	Availability

Once the availability indicator has been transmitted from *Materials Management* to *Training and Event Management*, either a purchase requisition or a material reservation is created in *Training and Event Management*. This is transmitted to *Materials Management* asynchronously.

Interfaces

Business object	Method	Message category	IDoc-
MaterialReservation	CreateFromData	MRESCR	MRESCR01
PurchaseRequisition	CreateFromData	PREQCR	PREQCR01

In *Training and Event Management*, a list of required materials is output with one or two reference numbers for the material order.

See also:

[Checking Material Order \[Page 461\]](#)

Checking Material Order

Checking Material Order

Procedure

To check the status of a material order:

1. Start report RHMARP00 again if you are no longer on the list output screen after running the material order report.
2. Double-click the reference number. (If no status check has been carried out so far, the traffic light icon beside the reference number is yellow.)

The system determines the status of the reservation or purchase requisition number synchronously.

Interfaces

Business object	Method
MaterialReservation	GetItems
PurchaseRequisition	GetItems

If the material order was successfully transmitted to *Materials Management*, the reservation or purchase requisition number created in MM is transmitted to *Training and Event Management*, where it can be viewed.

In this case, the traffic light shows green.

In the event of errors, the traffic light shows red. An error log is output, which you can use to correct the errors before starting the material order again.

Workflows in Training and Event Management

Error Handling in Correspondence

Purpose

The workflow *Error Handling Correspondence* (ERROR PD-SCM) informs administrators when errors occur in the automatic output of notifications. The administrator responsible receives a message to this effect in the workflow inbox, enabling him or her to output the correspondence manually.

See also:

[Manual Output of Correspondence \[Page 216\]](#)

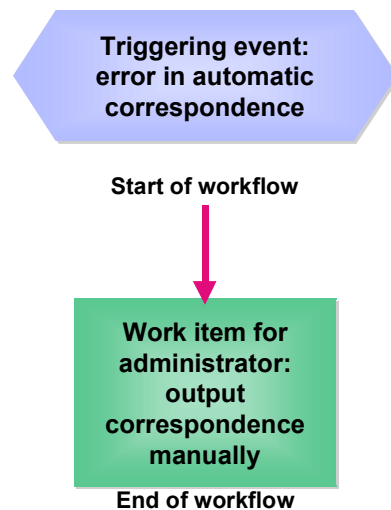
Prerequisites

You have activated (value X) the switch WORKF ACTIV in table T77S0.

The workflow is started when one of the following problems occurs:

- Lacking authorization
- Missing parameters (plan version, notification abbreviations, and so on)
- Missing form
- Form not allowed for user (user group)
- Incorrect recipient
- Missing address/name of output medium
- Missing data for required text variables

Process Flow



Result

The administrator receives notification in his or her workflow inbox to output the correspondence concerned manually.

Approval of Employee's Attendance Booking

Approval of Employee's Attendance Booking

Purpose

The workflow *Approve Employee's Attendance Booking* (PE_APPROVE01) lets you approve and book an employee's event attendance request that requires approval.

You can use this workflow for the Employee Self-Service *Training Center* (PV7I). Employees can use this service to view the training offering in your event catalog and enroll themselves for events or submit attendance requests where relevant.

See also:

[Service Training Center \[Page 379\]](#)

Prerequisites

- You have activated (value X) the switch WORKF_ACTIV in table T77S0.
- The workflow event *requested* of the Business Object PDRELA_025 has been used to maintain the triggering event.
- Agent assignment in step 88 *Approve Attendance Booking* has been maintained (for example, supervisor role 00000168).
- Agent assignment in step 120 *Book Attendance After Error* has been maintained (for example, *Training Administrator* role SAP_HR_PE_TRAININGADMIN).
- If the workflow is to be triggered from the Employee Self-Service *Training Center* (PV7I), you must ensure that the user authorizations have been maintained accordingly (no authorization to book → workflow event generation).

Process Flow

The workflow is triggered when an employee who is not authorized to book attendance at an event him or herself, tries to make an attendance booking (workflow event PDRELA_025 → Requested) in the Employee Self-Service *Training Center* (PV7I). The following workflow steps are involved and can then be triggered:

A work item is generated for the employee's supervisor, enabling the supervisor to process the attendance request. The supervisor can decide to approve or reject the request.

If the supervisor approves the attendance request, the employee is automatically booked for the event. The system then checks whether the booking was successful. If attendance was successfully booked, the employee receives automatic notification by mail that the booking has been made.

If errors occurred in the automatic booking, a work item is generated for the administrator responsible (role SAP_HR_PE_TRAININGADMIN), who can then make the booking manually.

If the supervisor rejects the request, the employee is notified by mail that the request has been rejected.

The workflow is terminated prematurely if the attendee requests cancellation of the booking that is the subject of this approval workflow in the Employee Self-Service *My Bookings* (PV8I): (workflow event PDRELA_025 → DELETEREQUESTED). This can result in the workflow *Employee's Attendance Cancellation* (PE_APPROVE02) being called.

Approval of Employee's Attendance Booking



Result

As the graphic illustrates, any of the following events can end the workflow:

- The check shows that attendance has already been approved.
- The supervisor rejects the attendance request. The employee is automatically informed by mail.
- The supervisor approves the attendance request and the booking is made successfully. The employee is notified of this by mail.
- The supervisor approves the request but an error occurs with the automatic booking. In this case, the administrator receives a work item in his or her workflow inbox.
- In the Employee Self-Service *My Bookings* (PV8I), the attendee subsequently requests cancellation of the booking that he or she has requested. This can result in the workflow *Employee's Attendance Cancellation* (PE_APPROVE02) being called.

Employee's Attendance Cancellation

Purpose

The workflow *Employee's Attendance Cancellation* (PE_APPROVE02) lets you cancel an attendance booking that requires approval.

You can use this workflow for the Employee Self-Service *My Bookings* (PV8I). Employees can use this service to view their booking data (cancellations, rebookings), cancel or rebook existing bookings, or to request a supervisor's approval where relevant.

See also:

[Service My Bookings \[Page 383\]](#)

Prerequisites

- You have activated (value X) the switch WORKF ACTIV in table T77S0.
- The workflow event *deleteRequested* of the Business Object PDRELA_025 has been used to maintain the triggering event.
- Agent assignment in step 93 *Approve Attendance Cancellation* has been maintained (for example, supervisor role 00000168).
- If the workflow is to be triggered from the Employee Self-Service *My Bookings* (PV8I), you must ensure that the user authorizations have been maintained accordingly (no authorization to cancel → workflow event generation).

Process Flow

The workflow is triggered when an employee who is not authorized to cancel attendance at an event him or herself, submits a request to cancel a booking (workflow event PDRELA_025 → DELETEREQUESTED) in the Employee Self-Service *My Bookings* (PV8I).

The following workflow steps are involved and can then be triggered:

The workflow checks whether the booking that is to be canceled is already booked or only requested. If the booking is still at the request stage, it is deleted without requiring the supervisor's approval. The attendee is notified that the attendance request has been canceled.

If the request has already been approved, cancellation requires approval. The system reads the attendee's cancellation data (cancellation fee). A work item is generated for the employee's supervisor, enabling the supervisor to approve or reject the cancellation request.



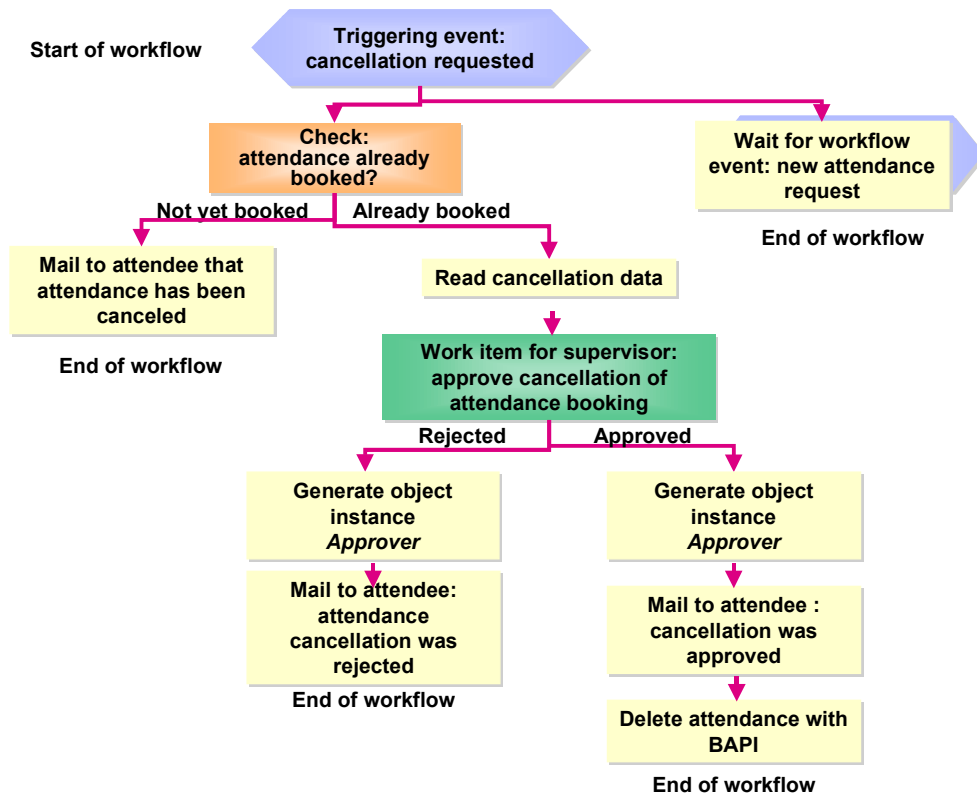
When determining the cancellation fee to be levied, the system first checks whether the Business Add-In (BADI) HRTEM00NET_WEBST is implemented. If it is implemented, it is called. This customer enhancement provides the valid cancellation reason or triggers an exception.

If an exception is triggered or the Badi is not implemented, the cancellation reason stored in table T77S0 in the switch SEMIN WEBST is taken. If there is no cancellation reason stored here, the switch SEMIN CCDEL is read to determine the cancellation reason. The cancellation reason (see table T77CAR) is used to calculate the cancellation fee.

Employee's Attendance Cancellation

If the supervisor approves the cancellation, the attendance booking is deleted automatically and the employee is informed of this automatically by mail. Similarly, if the supervisor rejects the rebooking request, the employee is notified of this by mail.

The workflow is terminated prematurely if the attendee submits another request to attend the same event that is the subject of this approval workflow in the Employee Self-Service *Training Center* (PV7I): (workflow event PDRELA_025 → REQUESTED).



Result

As the graphic illustrates, any of the following events can end the workflow:

- The check shows that the attendance booking to be canceled still has the status *requested*. In this case, the booking is canceled without generating a work item for the supervisor.
- The supervisor rejects the cancellation request.
- The supervisor approves the cancellation request.
- In the Employee Self-Service *Training Center* (PV7I), the attendee subsequently submits another request to attend the same event that he or she wanted to cancel. This can result in the workflow *Approve Employee's Attendance Booking* (PE_APPROVE01) being called.

See also:

[Approval of Employee's Attendance Booking \[Page 465\]](#)

Approve Employee's Attendance Rebooking

Approve Employee's Attendance Rebooking

Purpose

The workflow *Approve Employee's Attendance Rebooking* (PE_APPROVE03) lets you approve and carry out an employee's attendance rebooking that requires approval.

You can use this workflow for the Employee Self-Service *My Bookings* (PV8I). Employees can use this service to view their booking data (cancellations, rebookings), to cancel or rebook existing bookings, or to request a supervisor's approval where relevant.

See also:

[Service My Bookings \[Page 383\]](#)

Prerequisites

- You have activated (value X) the switch WORKF_ACTIV in table T77S0.
- The workflow event *moveRequested* of the Business Object PDRELA_025 has been used to maintain the triggering event.
- Agent assignment in step 13 *Approve Attendance Rebooking* has been maintained (for example, supervisor role 00000168).
- Agent assignment in step 90 *Manually Rebook Event Attendance* has been maintained (for example, *Training Administrator* role SAP_HR_TRAININGADMIN).
- If the workflow is to be triggered from the Employee Self-Service *My Bookings* (PV8I), you must ensure that the user authorizations have been maintained accordingly (no authorization to rebook/cancel → workflow event generation).

Process Flow

The workflow is triggered when an employee who is not authorized to cancel or book attendance at an event him or herself, submits a request to be rebooked for another event date (workflow event PDRELA_025 → MOVEREQUESTED) in the Employee Self-Service *My Bookings* (PV8I).

A work item is generated for the employee's supervisor, enabling the supervisor to process the rebooking request. The supervisor can decide to approve or reject the request.

If the supervisor approves the rebooking request, the employee is automatically rebooked for another event. The system then checks whether the booking was successful. If attendance was successfully rebooked, the employee receives automatic notification by mail that the booking has been made.

If errors occurred in the automatic booking, a work item is generated for the administrator responsible (role administrator training SAP_HR_PE_TRAININGADMIN) who can then make the booking manually.

If the supervisor rejects the rebooking request, the employee is notified by mail that the request has been rejected.

The workflow is terminated prematurely if any of the following events occur:

In the Employee Self-Service *Training Center* (PV7I) the employee submits a new attendance request for the business event for which he or she originally wanted to be rebooked (workflow

Approve Employee's Attendance Rebooking

event PDRELA_025 → REQUESTED). This can result in the workflow PE_APPROVE01 being called. The employee is notified by mail that the requested rebooking is now no longer possible.

In the Employee Self-Service *My Bookings* (PV8I), the employee submits a cancellation request for the old booking which he or she originally wanted to have rebooked. Or the employee submits a request to cancel the new booking for which he or she wanted to be rebooked (workflow event PDRELA_025 → DELETEREQUESTED). The employee is notified by mail that the requested rebooking is now no longer possible.



Result

As the graphic illustrates, any of the following events can end the workflow:

- The supervisor rejects the rebooking request. The employee is automatically informed by mail.
- The supervisor approves the rebooking request and the booking is made successfully. The employee is notified of this by mail.
- The supervisor approves the rebooking request but an error occurs with the automatic booking. In this case, the administrator receives a work item in his or her workflow inbox.
- The employee submits a request to cancel the requested rebooking. This can result in the workflow *Employee's Attendance Cancellation* (PE_APPROVE02) being called.
- The employee submits a request to cancel the original attendance booking. This can result in the workflow *Employee's Attendance Cancellation* (PE_APPROVE02) being called.

Approve Employee's Attendance Rebooking

- In the Employee Self-Service *Training Center* (PV71) the employee submits a new attendance request for the business event for which he or she originally wanted to be rebooked. This can result in the workflow *Approve Employee's Attendance Booking* (PE_APPROVE01) being called.

See also:

[Approval of Employee's Attendance Booking \[Page 465\]](#)

[Employee's Attendance Cancellation \[Page 467\]](#)

Room Reservation Management (PE-RPL)

Purpose

With the *Room Reservation Management* application component you can manage the booking and reservation of rooms for one-day business events such as meetings, product presentations, workshops, and other such events. The component also has a *Service* function that lets you organize and manage catering for rooms and events.

Integration

You can use *Room Reservation Management* integrated with the *Training and Event Management* component. Both components share the same data model. If integration is active, you must run both components in the same plan version.

The advantage of integration is that both components can access the same rooms, thus reducing duplicate data entry. This also helps prevent room reservation conflicts occurring.

The *Room Reservation Management* component can be connected to the R/3 mail system.

Features

- Reserve and book rooms for one-day events such as meetings, product presentations, or workshops
- Create the necessary master data (such as room data) directly in the *Room Reservation Management* main menu under *Current Settings*
- Administer room equipment such as overhead projectors or PCs
- Select rooms on the basis of the equipment they contain
- Assign room reservations to predefined reservation types such as meetings or lectures
- Make lunch reservations
- Specify the moderator and attendees for each room reservation
- Check capacity of rooms
- Display attendee lists
- Switch rooms (for example, due to insufficient room capacity) with other available or reserved rooms
- Rebook reservations for different dates or times
- Use the *Copy* function to create reservations swiftly and easily
- Delete room reservations
- Lock rooms temporarily (for example, for maintenance purposes)
- Check availability of moderators and attendees if integration with *Time Management* is active
- Check availability of and use the same rooms as *Training and Event Management* if integration is active

Room Reservation Management (PE-RPL)

- Use e-mail connection to correspond with users (person who created reservation) and event moderators when reservations are made
- Print name tags for attendees
- Request reports for rooms and equipment (for example, display available/reserved rooms per moderator or attendee)
- Request reports for services (for example, display lunch totals per day, rooms to be supplied with drinks).

Room Reservation Management (PE-RPL)

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Room Reservations

Definition

Reservation of a room for a business event, such as a meeting, for a maximum of one day.

Structure

You store the following data for a room reservation:

- Date (required entry)
- Time (required entry)
- Location (is determined on the basis of the room)
- Room (required entry)
- Reservation type (required entry)
- The reservation type includes details of whether cost center data is required and whether lunch reservations are allowed.
- Language (required entry)
- Moderator (required entry)
- Attendee (required entry; specify numbers in the case of group attendee)
- Cost center and controlling area of cost object of the business event (optional or required depending on reservation type)
- Lunch times (required entry if you want to make lunch reservations)
- Service (required entry if you want to make lunch reservations)
- Number of internal and external lunches (required entry if you want to make lunch reservations)
- Table number (optional entry)

See also:

[Creation of Room Reservations \[Page 478\]](#)

Setting Equipment Restrictions

Setting Equipment Restrictions

Use

You can set an equipment restriction on the initial screen of *Room Reservation Management* and with some of the functions as well. If you do so, the search for rooms is restricted to rooms that have the equipment you specify. This is possible with the following functions:




- [Creating a Room Reservation \[Page 479\]](#)
- [Displaying Available Rooms \[Page 506\]](#)
- [Displaying All Rooms \[Page 507\]](#)
- [Displaying Reserved Rooms \[Page 508\]](#)

Prerequisites

You must first create the relationship *is equipped with resource type* for the rooms. You create this relationship in Customizing for *Room Reservation Management* or in *Current Settings* under *Create Room*.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.

1. Choose  *Equipment*. The *Room Reservation: Set Required Room Equipment* screen appears.
2. Enter the equipment you require using the possible entries help function and specify the quantity required in each case. If necessary, you can delete existing entries by choosing .
3. Choose . You return to the *Room Reservations: Initial Screen*.

Result

The equipment restriction you require is now set. The system then only displays available rooms that have the equipment you require.



You can also use the functions *Create room reservation* or *Display available/reserved/all rooms* to display a list of all rooms regardless of the equipment they contain. You can then narrow down the list.

Any restriction you set is retained until you delete it or cancel processing.

Creation of Room Reservations

Use

You use this function to carry out all the activities involved in reserving a room for a one-day business event, including making lunch reservations if required.

Prerequisites

You must first create the master data that forms the basis of room reservations (rooms, moderator, attendees, and services).

You must create the relationship *is supplied by service* (B039) for rooms if you want to use the catering function for them.

Features

This function lets you

- Reserve rooms (that is, create a reservation in *planned* status)
- Firmly book rooms (that is, create a reservation in *active* status)



If you are not certain that a business event will definitely take place, you can simply reserve a room, that is, create the reservation in *planned* status. Once the date is fixed, you can use the *firmly book* function, in other words, put the reservation into *active* status.

Alternatively, you can firmly book a room from the outset. Since the same functions (rebook, switch, change, and delete) are available for both statuses, we recommend that you create room reservations in *active* status.

- Make lunch reservations for the attendees (if the reservation type allows)

Activities

You create room reservations by selecting the room that best suits your business event, which you then either reserve (*planned* status) or book firmly (*active* status).

You specify the event moderator and attendees.

If the reservation type allows lunch reservations, you can make lunch reservations, select a cafeteria, and specify the number of internal and external attendees for billing purposes. You can also reserve a specific table for the event.

The **Save** function reserves or firmly books the room for your event.

See also:

[Creating a Room Reservation \[Page 479\]](#)

[Firmly Booking a Room Reservation \[Page 481\]](#)


Creating a Room Reservation

Creating a Room Reservation



Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.

Initial screen:

1. Enter the *date*. You have two options.
 - a. If you require a room for a particular day, enter only the start date. You do not need to enter an end date in this case.
 - b. If you require a room for a particular period of time, enter a start date and an end date.
2. Enter the *time* for which you need the room. You can change this entry later on the data screen if necessary.
3. Enter a *location* if you require a room at a specific location. The search for rooms will be restricted to the location you specify.
4. If you want to set an equipment restriction, choose  *Equipment*. The system displays a list of available rooms that contain the equipment you require.

See also: [Setting Equipment Restrictions \[Page 477\]](#)

5. Choose . The *Create Room Reservation: Room Selection* screen appears displaying a list of available rooms.
6. Select a room with sufficient capacity and choose . Alternatively, you can double-click the relevant line. The data screen appears where you can create the room reservation.

Data screen:

1. Enter the *reservation type*.
2. If required, enter a text for the reservation type.
3. Select a *status*:
 - a. If you want to reserve rather than firmly book a room, select *planned* status. You can then use the function [firmly book room reservation \[Page 481\]](#) at a later date. This changes the status to *active*.
 - b. If you want to firmly book the room from the outset, select *active* status. This is the default setting.
4. Enter the *language* in which the business event is to be held. The default setting is the logon language.
5. Enter a *cost center* and a *controlling area* where relevant. These entries are obligatory if the reservation type you chose requires specification of a cost center.
6. Specify a *moderator type*. Enter the moderator in accordance with the moderator type you specified.

See also: [Moderators \[Page 482\]](#)

Creating a Room Reservation

7. Specify an *attendee type* and an *attendee*. Enter the attendee in accordance with the attendee type you specified. In the case of a group attendee such as an organizational unit, enter the *number* of attendees in the group.



A warning message is issued if the number of attendees you enter exceeds the room capacity. You can ignore this warning.

During the capacity check, the number of attendees plus moderator is compared with the capacity defined for the room.

8. If you expect other attendees, choose *Other attendees* in order to enter them.

See also: [Creating Other Attendees \[Page 486\]](#)

9. If you want to enter the names of the individual attendees in a group, choose *Individual attendees*.


See also: [Creating Individual Attendees \[Page 487\]](#)

10. Create a lunch reservation if required. If you do not require a lunch reservation, proceed from step 15.

If you want to create a lunch reservation and if lunch reservations are allowed for the reservation type, enter the period in which lunch is to be served in the *Lunch* field.



The screen layout depends on the settings you have made for the reservation type in Customizing for *Room Reservations*. If no lunch reservations are allowed for the reservation type you choose, the corresponding fields are not displayed.

11. Enter the appropriate *cafeteria*, that is, the *service*.
12. In the *External meals* field, enter the number of attendees for lunch that are to be billed externally.
13. In the *Internal meals* field, enter the number of attendees for lunch that are to be billed internally.
14. You can enter a *table number* if you want to request a particular table.
15. Choose .

Result

You have reserved a room, booked attendees and, where relevant, made lunch reservations for the attendees.


Firmly Booking a Room Reservation

Firmly Booking a Room Reservation

Use

If you created a room reservation in *planned* status using the *Reserve* function, you can now *firmly book* the reservation, in other words, change the status to *active*.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict the search for room reservations if required.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose *Room reservation* → *Firmly book*. The *Firmly Book Room Reservation: Selection* screen appears displaying a list of existing room reservations that match the selection criteria.
4. Select the room reservation you want and choose  or double-click the required line. The data screen of the selected room reservation appears.
5. Choose *Firmly book*.

Result

The room reservation has been set to status *active*.

See also:

[Creation of Room Reservations \[Page 478\]](#)

Moderator

Definition

Person who moderates a business event for which a room has been reserved (such as the person who calls a meeting).

A reservation record is created for the moderator of a room reservation just as for any other resource since it is assumed that the moderator is present during the business event (room reservation). This prevents reservation conflicts occurring by the moderator being reserved or booked for another event at the same time.

Use

Specification of a moderator can be useful in the following ways:

- It lets you specify who called a meeting (or similar event) and who is responsible for it.
- For objects of type P (Person), it lets you prevent the employee being booked for another, conflicting appointment.

In addition, the moderator is included in the capacity check for rooms. The moderator is considered an attendee for this purpose.

Structure

Moderators can be assigned to any object type that can represent individual persons (such as the object types *Person*, *External Person*, *Contact Person*, *User*, *Applicant*).

Integration

You specify what object types you want to allow as moderators in Customizing for *Room Reservation Management* under *Basic Settings for Room Reservation Management* → *Dialog Control* → *Technical Settings* → *Attendee Type/Moderator Control* → *Allowed Attendee Types/Moderators*.

Room Reservation Management must be integrated with the relevant components if you want to use certain object types as moderator. For example, if you want to use the object type *Contact Person*, you require integration with the *Sales and Distribution* component (SD).

The moderator you specify must already exist as an object in the system. In other words, object data should have been created in the relevant component:

Component	Object Type
<i>Training and Event Management:</i>	External Person
<i>Personnel Administration</i>	Person
<i>Sales and Distribution:</i>	Contact Person
<i>User Master:</i>	User
<i>Applicant Master:</i>	Applicant

Moderator

See also:

[Attendees \[Page 484\]](#)

Attendees

Definition

Real persons who are attendees of business events for which a room is reserved.

There are three options for booking attendees for a business event:

- You can book a group of persons (for example, an organizational unit or a customer) as a group attendee.
- You can book an individual person (for example, a user or an applicant) as an individual attendee.
- You can book individual persons belonging to a group attendee as individual attendees.

Use

When you specify the number of attendees for the room reservation, a capacity check is carried out against the capacity defined for the room. A warning message is issued if the number of attendees exceeds the room capacity.



The moderator is included in the number of attendees for the capacity check.

Integration

You specify what object types you want to allow as attendee types in Customizing for *Room Reservation Management* under *Basic Settings for Room Reservation Management* → *Dialog Control* → *Technical Settings* → *Attendee Type/Moderator Control* → *Allowed Attendee Types/Moderators*. You also specify here what individual attendees are allowed per attendee type, and what attendee types are allowed as moderators.

If you want to book an attendee for a business event, you should already have created this attendee in Customizing for the component in question.

You create attendees of the type *Organizational Unit* directly in Customizing for *Room Reservation Management* under *Master Data* → *Create Organizational Unit*.

If you want to allow other attendee types in addition to organizational units, you must create them in the following components and use them if integration is active:

Component	Object Type
<i>Training and Event Management:</i>	External Person, Company
Personnel Administration	Person
<i>Sales and Distribution:</i>	Contact Person, Customer
<i>User Master:</i>	User
<i>Applicant Master:</i>	Applicant

Attendees

If you use both *Room Reservation Management* and *Organizational Management* integrated in the same plan version, you have access to the same organizational units.

See also:

[Booking Other Attendees \[Page 486\]](#)

[Creating Individual Attendees \[Page 487\]](#)

Booking Other Attendees

Use


You use the function *Other attendees* when you have already entered an attendee (group or individual) for a room reservation and want to enter more.

Prerequisites

You should have previously specified an attendee type and entered the corresponding attendee on the data screen.

Procedure

On the *Room Reservation Management Data Screen*:

1. Choose *Other attendees*. The *Room Reservations: Change Attendee* screen appears.
2. Enter the attendee type, the attendee (ID), and the expected *number* of individual attendees (for a group attendee).
3. Choose .

Result

You have booked further attendees for a room reservation.

See also:

[Attendees \[Page 484\]](#)

[Creating a Room Reservation \[Page 479\]](#)

Creating Individual Attendees

Creating Individual Attendees

Use

You use this function to enter the names of the individual attendees belonging to a group attendee that you have booked. This information can be used when you execute the function *Print name tags*.

See also:


[Printing Name Tags \[Page 505\]](#)

Prerequisites

You must first enter a group attendee in the *Attendee* field on the data screen or under *Other attendees*.


Procedure I

Under *Attendee* on the data screen you entered a group attendee and the number of attendees in the group.

1. Choose *Individual attendee*. The *Change Attendee* screen appears where you can specify the number of individual attendees in the group.
2. Enter the attendee type and the names of the individual attendees. You can display a list of the employees belonging to the group attendee using the possible entries help function.
3. Choose .

Procedure II

You chose the function *Other Attendees* and are on the data screen *Change Attendee*, where you have entered a group attendee and specified the number of individual attendees in the group.

1. Select the required group attendee and choose *Individual attendees*.
2. Enter the attendee type and the names of the *individual attendees*. You can display a list of the employees belonging to the group attendee using the possible entries help function.
3. Choose .

Result

You have entered data for the individual attendees of a group attendee booked for a business event.

See also:

[Creating a Room Reservation \[Page 479\]](#)

[Booking Other Attendees \[Page 486\]](#)

Find Room Reservations

Use


You can refine the search for existing room reservations that you want to further process by specifying selection criteria.

Integration

You should use the *selection criteria restriction* option on the initial screen for the following functions:

- [Displaying a Room Reservation \[Page 490\]](#)
- [Changing a Room Reservation \[Page 491\]](#)
- [Rebooking a Room Reservation \[Page 495\]](#)
- [Switching Rooms \[Page 497\]](#)
- [Copying a Room Reservation \[Page 490\]](#)
- [Firmly Booking a Room Reservation \[Page 481\]](#)
- [Deleting a Room Reservation \[Page 499\]](#)
- [Printing Name Tags \[Page 505\]](#)



In addition, if you enter a specific moderator, a specific attendee, or your own user directly and choose , you can display the room reservations that exist for the pertinent person in the time period.

Activities

You can restrict the search using the following selection criteria:

- Date
- Time
- Location
- Moderator
- Attendees
- User

See also:

[Finding a Room Reservation \[Page 489\]](#)

Finding a Room Reservation


Finding a Room Reservation

Use


You can specify selection criteria to speed up the search for room reservations.

Procedure

On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*.

1. Enter the *date*. You have two options.
 - a) If you require a room reservation for a particular day, enter only the start date. You do not need to enter an end date in this case.
 - b) If you require a room reservation for a particular period, enter both start date and end date.
2. If required, enter the *time*.
3. If required, enter the *location*.
4. If required, enter the *moderator*.
5. Choose the function you require, for example .



If you want to select on the basis of an attendee or on the basis of room reservations you have created, choose  for the pertinent line.

Result

You have set your selection criteria and the system displays the room reservations that match your criteria.

See also:

[Find Room Reservations \[Page 488\]](#)

Displaying a Room Reservation



Prerequisites

You should have already created room reservations.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict the search for room reservations if required.

See also: [Find Room Reservation \[Page 489\]](#)

3. Choose . The *Room Reservations* screen appears displaying a list of existing room reservations that match the selection criteria.
4. Select the room reservation you want and choose  or double-click the required line.




Result

The room reservation you selected is displayed.

Changing a Room Reservation

Changing a Room Reservation

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict your search for room reservations.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose . The *Change Room Reservation: Selection* screen appears.
4. Select the room reservation you want and choose  or double-click the required line. The data screen of the selected room reservation appears.
5. Change data as required.
6. Choose .

Result

The room reservation has been changed.

See also:

[Room Reservation Rebookings \[Page 494\]](#)

[Rebooking a Room Reservation \[Page 495\]](#)

[Room Switches \[Page 496\]](#)

[Switching Rooms \[Page 497\]](#)

Creation of Room Reservations by Copying

Use

If you have business events of the same type that take place at regular intervals over a long period of time, or events frequently held with the same moderators or attendees, the *Copy* function speeds up the process of creating room reservations.

In such cases, you copy an existing room reservation and change data as required, for example, by entering a new date. You can change all of the default data proposed.

Features

- Copy existing room reservations.
- Copy multiple times using the fast data entry feature. You remain on the data screen until you have created the required number of reservations by copying.

Activities

You first create a room reservation or select a suitable existing room reservation.

When you copy a room reservation, you may be able to reserve the same room that you booked for the first event if it is available. By selecting *Same room (if possible)*, you can book the same room if available for the new date. If you select *Same equipment*, then only rooms that have the equipment in question are displayed.

If the same room is not available, a list appears showing available rooms that match the equipment restrictions (where set). You can choose a suitable room from this list.

You can retain all the other data for the room reservation when copying, or you can change this data if required.

Once you have copied a room reservation for the first time, you can remain on the data screen and copy from the room reservation that you have just created.





See also:

[Copying a Room Reservation \[Page 493\]](#)

Copying a Room Reservation

Copying a Room Reservation

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict the search for room reservations if required.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose . The *Room Reservation: Create By Copying Selection* screen appears displaying a list of existing room reservations that match the selection criteria.
4. Select the room reservation you want and choose  or double-click the required line. The *Copy* dialog box appears.
5. Enter a *new date* where relevant.
6. Enter a *new time* where relevant.
7. Entries to make for the room:
 - a. If you want to reserve the *same room* (if available) for the new date, no entry is required. This is the default setting.
 - b. If you want a different room, deselect the option.
8. Entries to make for the equipment:
 - a. If you want to reserve the same equipment for the new date, no entry is required. This is the default setting.
 - b. If you want to have different equipment, deselect this option.
9. Choose . The data screen of the copied room reservation appears.
10. Change data as required.
11. Choose .

Result

You have created a new room reservation by copying an existing one.

See also:

[Creation of Room Reservations by Copying \[Page 492\]](#)

Room Reservation Rebookings

Use

If the date or time of a business event changes, but all other data on the room reservation remains unchanged, you can rebook the room reservation.

Integration

You can access the function *Switch Rooms* from the *Rebook Room Reservation* function. In this case, you must select either the parameter *Available rooms* or *Reserved rooms* and deselect the option *Same room (if possible)* in the dialog box that appears when you call the *Rebook* function.

See also:

[Room Switches \[Page 496\]](#)

Prerequisites

Room reservations should already have been created.

Features

- You can change the date.
- You can change the time.
- By selecting *Same room (if possible)*, you can book the same room if available for the new date.
- The same applies to the equipment. If you select *Same equipment*, only rooms that have the equipment in question are displayed for selection.
- If, however, the same room is not available, a list appears showing available rooms that match the equipment restrictions (where set). You can choose a suitable room from this list.

See also:





[Rebooking a Room Reservation \[Page 495\]](#)

[Switching Rooms \[Page 497\]](#)

Rebooking a Room Reservation

Rebooking a Room Reservation

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict the search for room reservations if required.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose . The *Change Room Reservation: Selection* screen appears.
4. Select the room reservation you want from the list displayed and choose  or double-click the required line. The data screen of the selected room reservation appears.
5. Choose *Rebook*. The *Rebook* dialog box appears.
6. Enter the *new date* where relevant.
7. Enter the *new time* where relevant.
8. Entries to make for the *room*:
 - a. If you want to have the *same room* for the new date if available, no entry is required. This is the default setting.
 - b. If you want a different room, deselect the option.
9. Entries to make for the *equipment*:
 - a. If you want to reserve the same equipment for the new date, no entry is required. This is the default setting.
 - b. If you want to have different equipment, deselect this option.
10. Choose .
11. Choose .

Result

You have rebooked the room reservation.

See also:

[Room Reservation Rebookings \[Page 494\]](#)

Room Switches

Use

If you discover that a room is not suitable for a particular event, but want the date and time of the event to remain the same, this function lets you switch one room for another.

You may need to do this if, for example, the number of attendees is larger than expected and exceeds the room capacity, or if the room equipment is inadequate.

Features

- Switch to an available room
- Switch to a reserved room
- Switch to a room with the same equipment (where possible)

Activities

If you select a room whose capacity is too small for the number of attendees booked for the business event, the system issues a warning message. Choose *Rebook*. A dialog box appears in which you can select a different room.

See also:





[Switching Rooms \[Page 497\]](#)

[Room Reservation Rebookings \[Page 494\]](#)

Switching Rooms

Switching Rooms

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict your search for room reservations.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose . The *Change Room Reservation: Selection* screen appears.
4. Select the room reservation you want and choose  or double-click the required line. The data screen of the selected room reservation appears.
5. Choose *Rebook*. The *Rebook* dialog box appears.
6. Entries to make for the room:
 - a. If you want to switch the room for an *available* or a *reserved room*, select the appropriate option.
 - b. Deselect the *Same room (if possible)* option.
7. Entries to make for the equipment:
 - a. If you want to have the *same equipment* in the new room, no entry is required. This is the default setting.
 - b. If you want to have different equipment, deselect this option.
8. Choose . The *Rebook/Copy Room Reservation: Selection* screen appears.
9. Select a suitable room by double-clicking it. You return to the data screen of the room reservation.
10. Choose .

Result

You have switched the room originally reserved for another, more suitable room.

See also:

[Room Switches \[Page 496\]](#)

Deletion of Room Reservations

Use

This function lets you delete an existing room reservation, for example, if a business event has to be canceled.

Integration

It makes no difference whether the reservation you want to delete is in *planned* or *active* status.

If integration with *Time Management* is active, the relevant attendance records for attendees and moderators are also deleted.



See also:

[Deleting a Room Reservation \[Page 499\]](#)

Deleting a Room Reservation

Deleting a Room Reservation

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict the search for room reservations.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose *Room reservation → Delete*. The *Delete Room Reservation: Selection* screen appears.
4. Select the room reservation you want and choose  or double-click the required line. The data screen of the selected room reservation appears.
5. Choose .

Result

You have deleted the room reservation.

See also:

[Deletion of Room Reservations \[Page 498\]](#)

Resource Locking/Unlocking

Use

This function lets you temporarily lock resources of the resource type *Room* to prevent other users from using them. When you lock rooms for a certain period, they are no longer available for selection during this period.

This function is useful, for example, when rooms need to be maintained or serviced.

It may be necessary to temporarily lock a room that is to be renovated. In this case, you would use this function to lock the room for the period of the renovation and unlock it afterwards.

Integration

This function is used in the application components *Room Reservation Management* and *Training and Event Management*.

Prerequisites

If you want to use this function, you must first define what is termed an *initial service* in Customizing for *Room Reservation Management* under *Basic Settings for Room Reservation Management* → *Dialog Control* → *Technical Settings* → *Define Initial Objects*.

Features

- You may lock resources for periods during which they are not reserved. If the lock period you define contains days on which the resource is reserved, the lock is only active on the non-reserved days.
- Locked rooms are flagged in *Room Reservation Management* with the reservation type *Maintenance*.
- Locks are effective for whole day periods, not for specific time blocks on a specific day.

Activities


The user must specify the resource to be locked and the time period. The system locks the resource for the required period.

The lock is automatically removed when the lock period expires. You can, however, remove the lock at any time by deleting the lock record with the function *Unlock Resource*.

Locking Resources



Locking Resources

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.
2. Choose  *Resource*. The *Lock/Unlock Resource* screen appears.
3. Enter the resource you want to lock.
4. Enter a selection period.



The selection period you specify determines what reservations and locked resources are displayed. The period you specify should be long enough to ensure that any reservations that may exist in the lock period are displayed.

5. Choose . The system displays existing reservations.
6. Enter the required lock period.
7. Choose  *Lock*. The system locks the resource and displays the start and end dates of the lock period.

Result


The locked resource is not available in the lock period from 00:00 to 24:00 o'clock.

Unlocking Resources

Prerequisites

There must be locked resources.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. Choose  *Resource*. The *Lock/Unlock Resource* screen appears.
3. Enter the resource you want to unlock.
4. Enter a selection period.
5. The system displays existing locked resources.



The selection period you specify determines what reservations and locked resources are displayed. The period you specify should be long enough to ensure that the required lock period is displayed.

6. Select the lock period in which you want to unlock the resource.



You can delete multiple locks at the same time. To do so, select all of the locked resources you want to unlock.

7. Choose  *Resource*.

Result

The resource is now unlocked and is available for resource selection and reservation in *Training and Event Management*.

Reporting for Room Reservation Management

Use

Room Reservation Management offers a wide range of reports that facilitate creation, editing, and processing of room reservations.

Prerequisites

There must be room data stored that can be used in the reports.

Features

The following reports are available:

Room Reservations:

- [Displaying Available Rooms \[Page 506\]](#)
- [Displaying Reserved Rooms \[Page 508\]](#)
- [Displaying All Rooms \[Page 507\]](#)

Business Event Execution:


- [Printing Name Tags \[Page 505\]](#)
- [Displaying an Attendee List \[Page 504\]](#)

Display and Edit Room Reservations (Change, Copy, etc.):


- Reservations per Moderator
- Reservations per Attendee
- Reservations per User

Activities

You enter the relevant data (selection period, time, and location) on the initial screen and select the required report from the menu bar.

The reports *Reservations per Moderator/Attendee* also require specification of the person and the report in the same line by choosing .





No further specifications are required for the report *Reservations per User*. You simply start the report by choosing  in the same line.

Displaying an Attendee List

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict your search for room reservations.

See also: [Find Room Reservation \[Page 489\]](#)

3. Choose . The *Room Reservation: Attendee List: Selection* screen appears.
4. Select the room reservation you want and choose  or double-click the required line.

Result

The attendee list for the room reservation in question is displayed.

See also:

[Attendees \[Page 484\]](#)

Printing Name Tags

Printing Name Tags

Use



You can use this report to create name tags for attendees of a business event or room reservation.

Prerequisites

In the case of group attendees, you should first enter the individual names of the attendees in the group.

See also: [Creating Individual Attendees \[Page 487\]](#)

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. You can restrict your search for room reservations.
See also: [Find Room Reservation \[Page 489\]](#)
3. Choose . The *Room Reservation: Name Tags: Selection* screen appears.
4. Select the room reservation you want and choose  or double-click the required line. The *Display or Print Attendees' Name Tags* screen appears.
5. Enter data as required.
6. Select *Print Immediately* or *Print to Spool*.

Result

The name tags for the room reservation selected are printed.

Displaying Available Rooms

Use

You use this report to create a list of rooms that are available for reservation in the selection period.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. Enter the *date*. You have two options.
 - a. If you want to display the rooms reserved on a specific day, enter the start date. You do not need to enter an end date in this case.
 - b. If you want to display the rooms available within a particular period, enter both start date and end date.
3. If required, enter the *time*.
4. If you want to further restrict the search for available rooms, enter a *location*.
5. Choose *Available rooms*.

Result

A list appears showing the rooms available.

See also:

[Displaying All Rooms \[Page 507\]](#)

[Displaying Reserved Rooms \[Page 508\]](#)

Displaying All Rooms

Displaying All Rooms

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Room Reservations* → *Reservation*. The *Room Reservations: Initial Screen* appears.
2. Enter the *date*. You have two options.
 - a. If you want to display the rooms reserved on a specific day, enter the start date. You do not need to enter an end date in this case.
 - b. If you want to display all existing rooms within a particular period, enter both start date and end date.
3. If required, enter the *time*.
4. If required, enter a *location*.
5. Choose *All rooms*.

Result

A list of all existing rooms is displayed.



Every room is displayed with a reservation status indicated by a traffic light icon.

Green traffic light: The room is available. There are no reservations recorded in the selection period.

Yellow traffic light: The room is partly reserved. There are reservations recorded for specific time blocks in the selection period but not for the entire period specified. Additional reservations are possible.

Red traffic light: The room is reserved for the entire selection period.

See also:

[Displaying Available Rooms \[Page 506\]](#)

[Displaying Reserved Rooms \[Page 508\]](#)

Displaying Reserved Rooms

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Room Reservations → Reservation*. The *Room Reservations: Initial Screen* appears.
2. Enter the *date*. You have two options.
 - a. If you want to display the rooms reserved on a specific day, enter the start date. You do not need to enter an end date in this case.
 - b. If you want to display all the rooms reserved within a particular period, enter both start date and end date.
3. If required, enter the *time*.
4. If required, enter a *location*.
5. Choose *Reserved rooms*.

Result

A list appears showing the reserved rooms.



Every room is displayed with a reservation status indicated by a traffic light icon.

Green traffic light: The room is available. There are no reservations recorded in the selection period.

Yellow traffic light: The room is partly reserved. There are reservations recorded for specific time blocks in the selection period but not for the entire period specified. Additional reservations are possible.

Red traffic light: The room is reserved for the entire selection period.

See also:

[Displaying Available Rooms \[Page 506\]](#)

[Displaying All Rooms \[Page 507\]](#)

Services

Services

Definition

Catering services such as a cafeteria or a canteen that supplies attendees of a business event with drinks, beverages, lunch, or other refreshments.

Structure

You create services in Customizing for *Room Reservation Management* under *Master Data* → *Services* → *Create Service*.

In another step, you specify the time intervals for lunches under *Master Data* → *Services* → *Define Lunch Times*. When you create a room reservation, you can select a time interval for lunch for the room.



You can also make these settings in *Current Settings* in the steps of the same names. You access *Current Settings* on the initial screen of *Room Reservation Management* under *Environment*.

Integration

When you create a room reservation, you must specify a service and a lunch period if you want to arrange catering for the attendees. You specify whether lunch reservations are allowed for the event in the *reservation type* data.

For reporting purposes, when you want to report on what rooms have to be supplied with drinks, you have to create the relationship *is supplied by* between the room and the service.

You create this relationship in Customizing or in *Current Settings for Room Reservation Management* under *Create Room*.

Reporting for Services

Use

Reporting for services in *Room Reservation Management* lets you ensure that catering is provided for rooms and attendees.

Prerequisites

You must create the relationship *is supplied by* between a room and a service before you can request the report *Rooms to Be Supplied* which determines which rooms are to be supplied with drinks.

Features

- Display lunches per room reservation (split by internal and external attendees)
- Display lunch totals per room
- Display rooms to be supplied with beverages
- Display additional data in the lists output:
 - Room
 - Telephone number of rooms (where available)
 - Moderator
 - Lunch times
 - Table number (where available)

Activities

You access the reports for services on the *SAP Easy Access* screen, in the *SAP Standard Menu* under → *Room Reservation* → *Catering*.

You enter a selection period and a service on the initial screen and choose the required report.

On the report's list screen, you can display the data of the room reservation by double-clicking the relevant line. The *Change* function lets you change data, for example, the data of a lunch reservation. A service employee may enter the table number allocated to the business event for information purposes for the moderator, for instance.

See also:

[Displaying Lunch Totals per Room \[Page 511\]](#)

[Displaying Lunch Totals per Lunch Period \[Page 512\]](#)

[Displaying Rooms to Be Supplied \[Page 513\]](#)

Displaying Lunch Totals per Room

Displaying Lunch Totals per Room

Use

This report lets you display the total number of lunches per room supplied by a service in the selection period.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Catering*. The *Services: Initial Screen* appears.
2. Enter the *date*. You have two options.
 - a. If you want to display the rooms reserved on a specific day, enter the start date. You do not need to enter an end date in this case.
 - b. If you want to display the lunch totals within a particular period, enter both a start and an end date.
3. Enter the *Service*.
4. Choose *Lunch*.

Result

A list appears showing the number of internal and external lunches as well as the total number of lunches per room.

See also:

[Reporting for Services \[Page 510\]](#)

[Displaying Lunch Totals per Lunch Period \[Page 512\]](#)


[Displaying Rooms to Be Supplied \[Page 513\]](#)

Displaying Lunch Totals per Lunch Period

Use

This report lets you display the total number of lunches provided by a service per lunch period in a given period.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office → Catering*. The *Services: Initial Screen* appears.
2. Enter the *date*. You have two options.
 - a. If you want to display the rooms reserved on a specific day, enter the start date. You do not need to enter an end date in this case.
 - b. If you want to display the lunch totals within a particular period, enter both a start and an end date.
3. Enter the *Service*.
4. Choose  *Lunch*.

Result

A list appears showing the number of internal and external lunches as well as the total number of lunches per lunch period supplied by the service on each day of the business event.

See also:

[Reporting for Services \[Page 510\]](#)

[Displaying Lunch Totals per Room \[Page 511\]](#)

[Displaying Rooms to Be Supplied \[Page 513\]](#)

Displaying Rooms to Be Supplied

Displaying Rooms to Be Supplied

Use

This report lets you display the rooms that are to be supplied with beverages by a service in the selection period.

Prerequisites

You should have already created the relationship *is supplied by* for the resource *room*.

Procedure

1. On the *SAP Easy Access* screen, in the *SAP Standard Menu*, choose *Office* → *Catering*. The *Services: Initial Screen* appears.
2. Enter the *date*. You have two options.
 - a. If you want to display the rooms reserved on a specific day, enter the start date. You do not need to enter an end date in this case.
 - b. If you want to display the rooms to be supplied within a particular period, enter both a start and an end date.
3. Enter the *Service*.
4. Choose *Rooms to be supplied*.

Result

A list appears showing the rooms to be supplied each day.

See also:

[Reporting for Services \[Page 510\]](#)

[Displaying Lunch Totals per Room \[Page 511\]](#)

[Displaying Lunch Totals per Lunch Period \[Page 512\]](#)