PROJECT SAKSHAM

END USER DOCUMENT

BBP_HRM_TRUST

CPF number allotment

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DOCUMENT CONTROL

This is a controlled document and will be maintained on UPPCL portal.

Changes to this document will be recorded below and must be published to all interested parties.

DOCUMENT HISTORY

Version	Date	Author	VERSION DETAILS
V0.1	29.11.2022	Dayeeta Ray	Initial Submission
V 1.0	19-12-2022	Souvik Hazra	First Review

DISTRIBUTION

Date	Type of Users	Purpose

User Roles – Posts using Process Explained in Manual

Date	Roles	Posts	Purpose

OVERVIEW

UPPCL and its employees' PF number will be auto generated from the SAP ERP system. For this purpose, we have developed a dashboard ZPF_TRUST. In this user manual we are showing steps for PF number allotment and nominee addition.

MENU PATH

Use the SAP Logon.

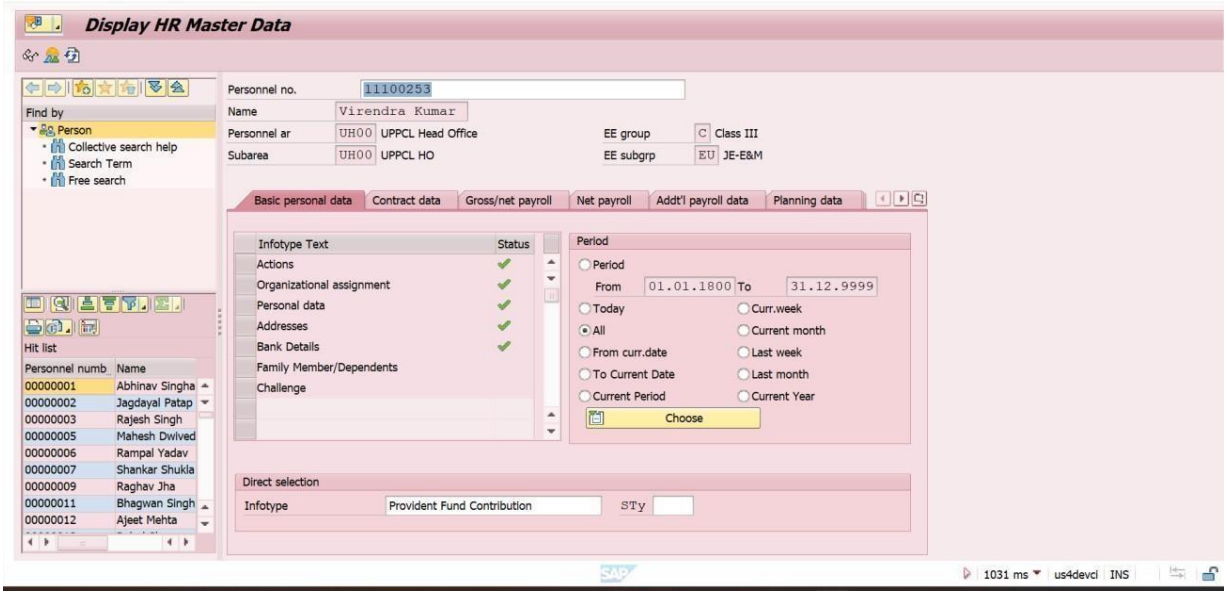
USER ROLE

User should have access to the SAP GUI Log on and to the ZPF_TRUST dashboard.

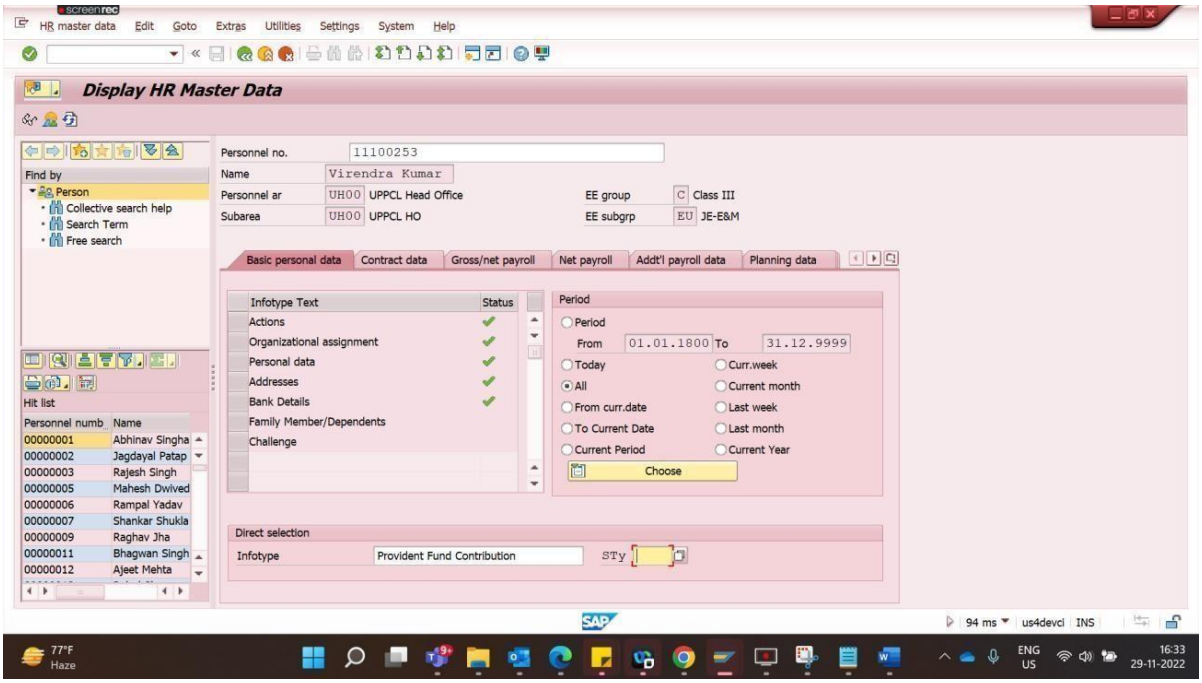
STEPS:

A. Employee Hiring and member creation for UPPCL and DISCOMs

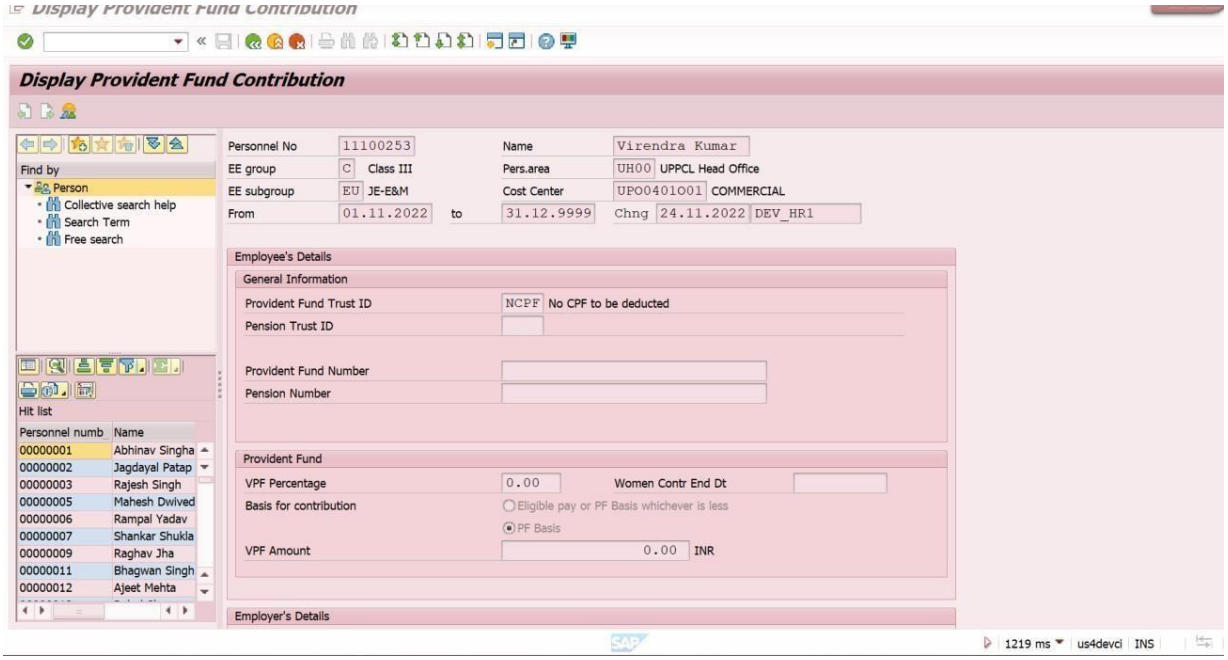
1. Hire the new employee through PA40. Please make sure info type 6 (Address), 9(Bank Details),Info type 0105 (Communications) and First Name and Last Name both are maintained in Info type0002 (Personal Data). Please check the same through PA30 and pa20. Employee Vendor should be created by the scheduler, based on the info types mentioned earlier.



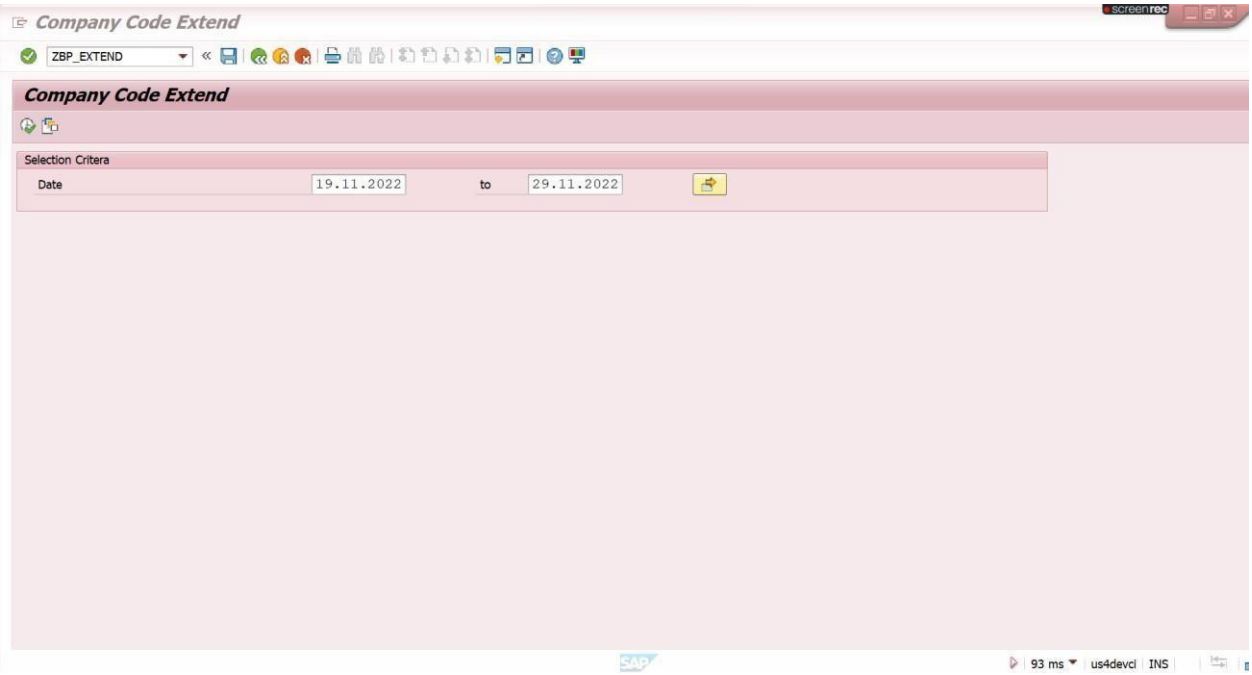
2. Please go to info type 0587 (Provident Fund Contribution).



3. Enter NCPF in the Provident Fund Trust ID Field, and please leave the Provident Fund Number blank and save the info type.



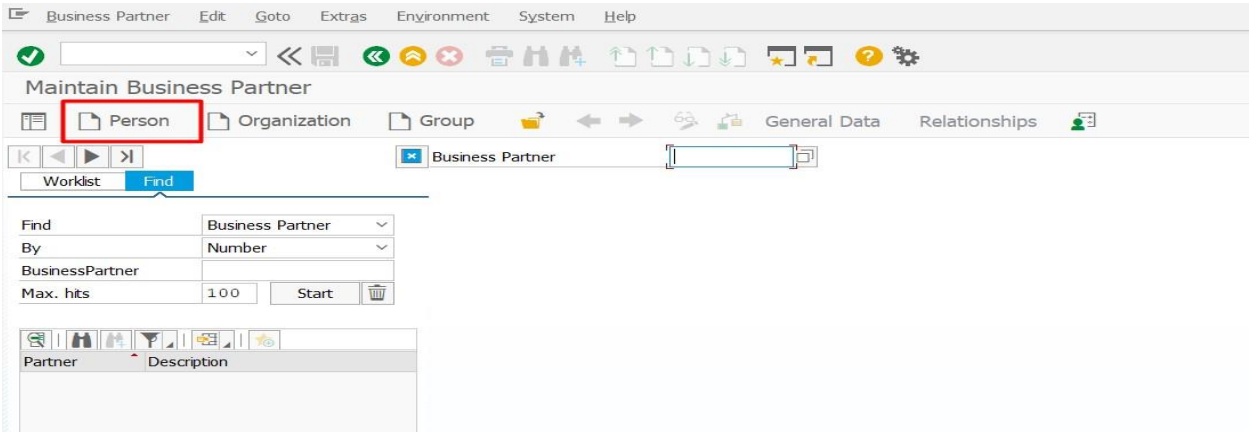
4. Please run T code **ZBP_EXTEND**. This will extend the BP to CPFT company code for all the newly created personnel numbers. This program will be scheduled in the background.



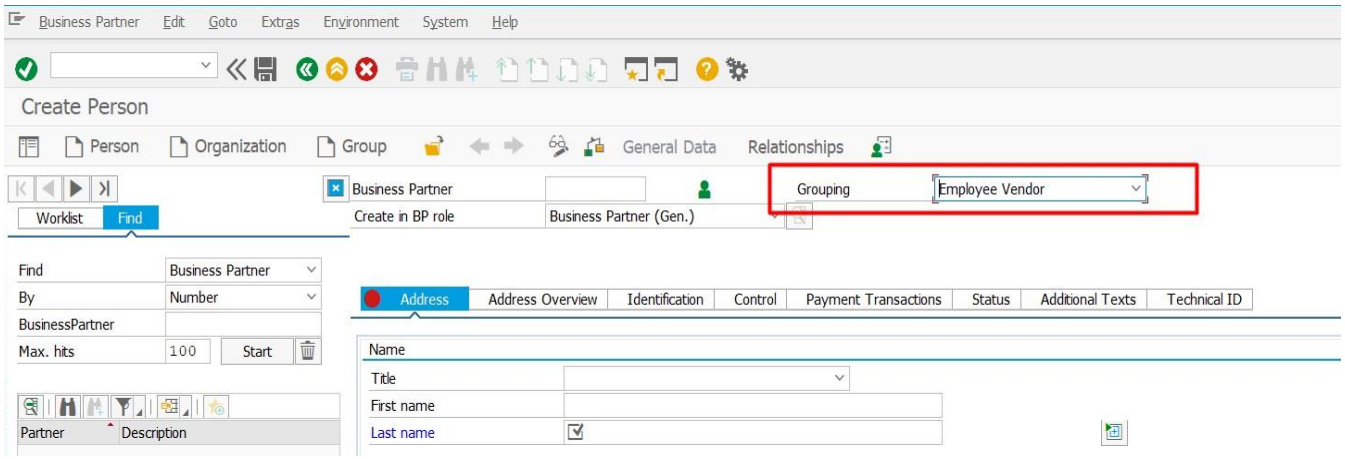
B. Member creation for UPPTCL (Only for Non-Common Cadre employees hired in UPPTCL Server)

1. Open Transaction Code **BP**

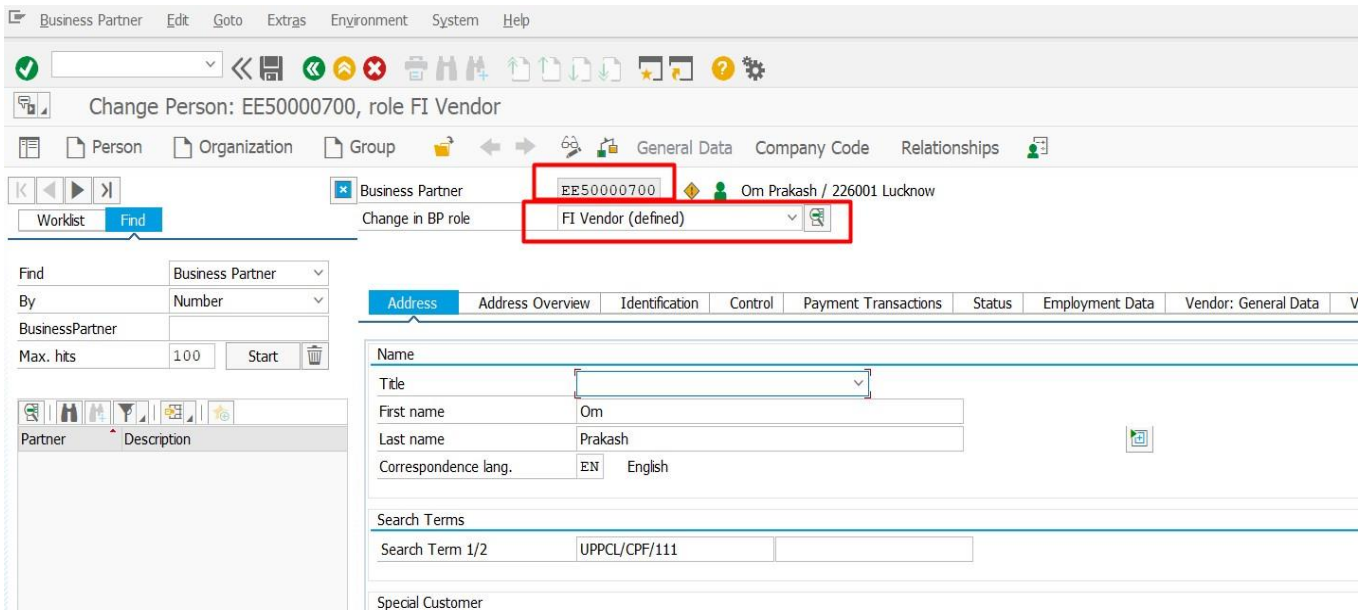
2. Click on Person



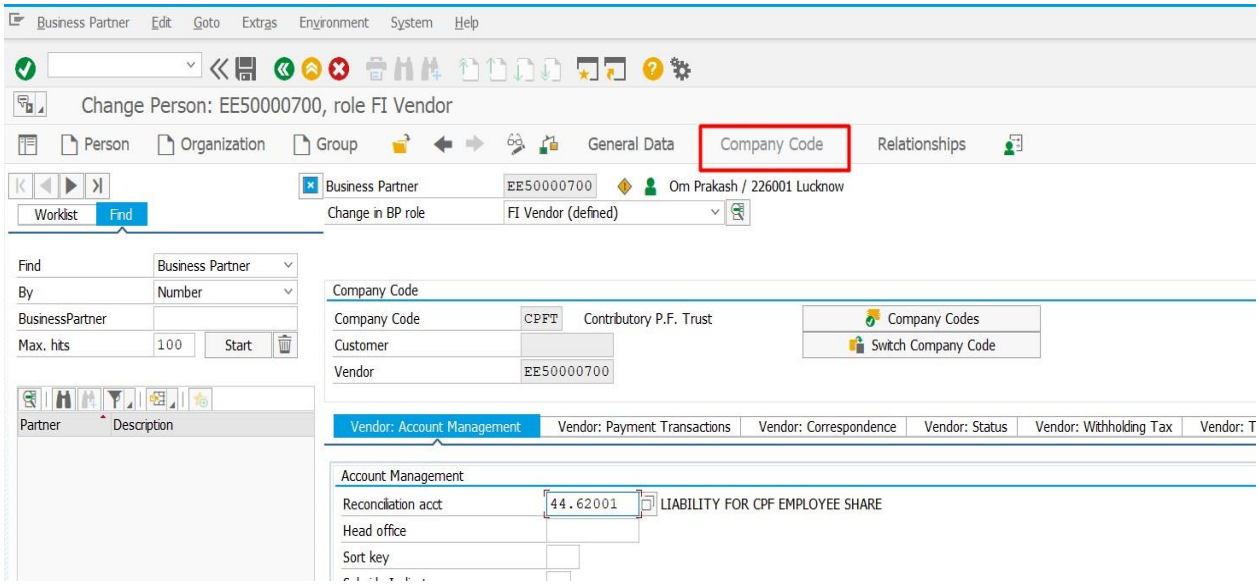
3. Select BP Group as **Employee vendor.**

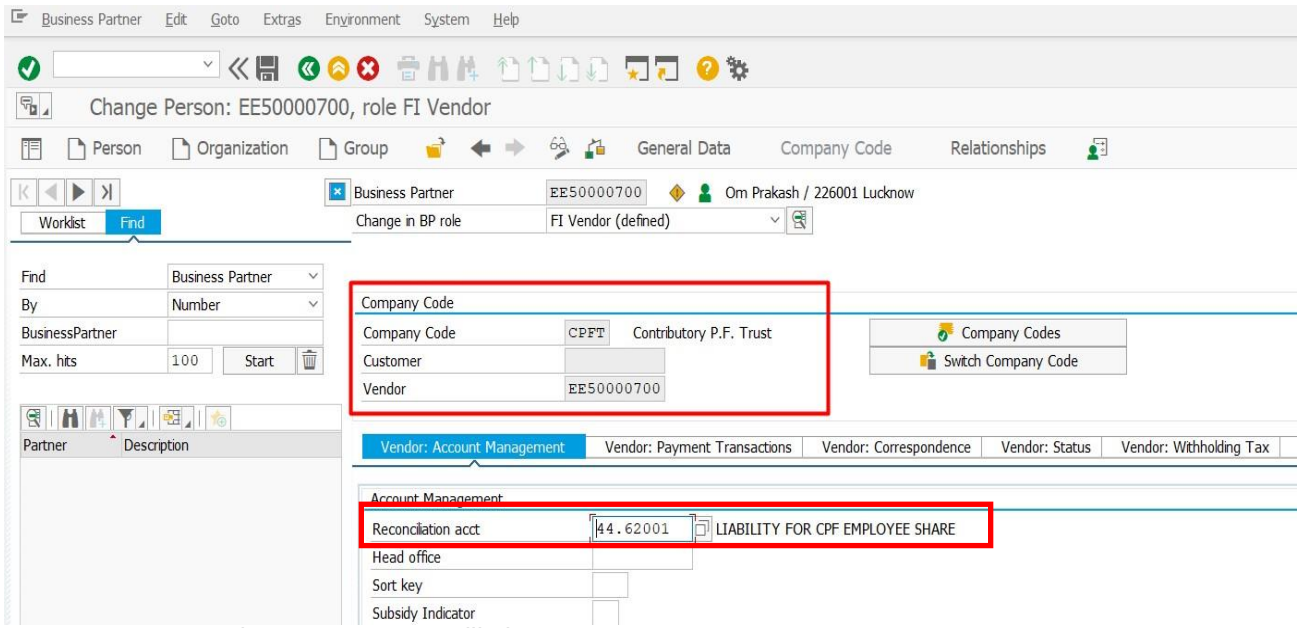


4. Enter Business Partner number as “EE+SAP ID of the Employee” and then select BP Role as “FI-Vendor.”

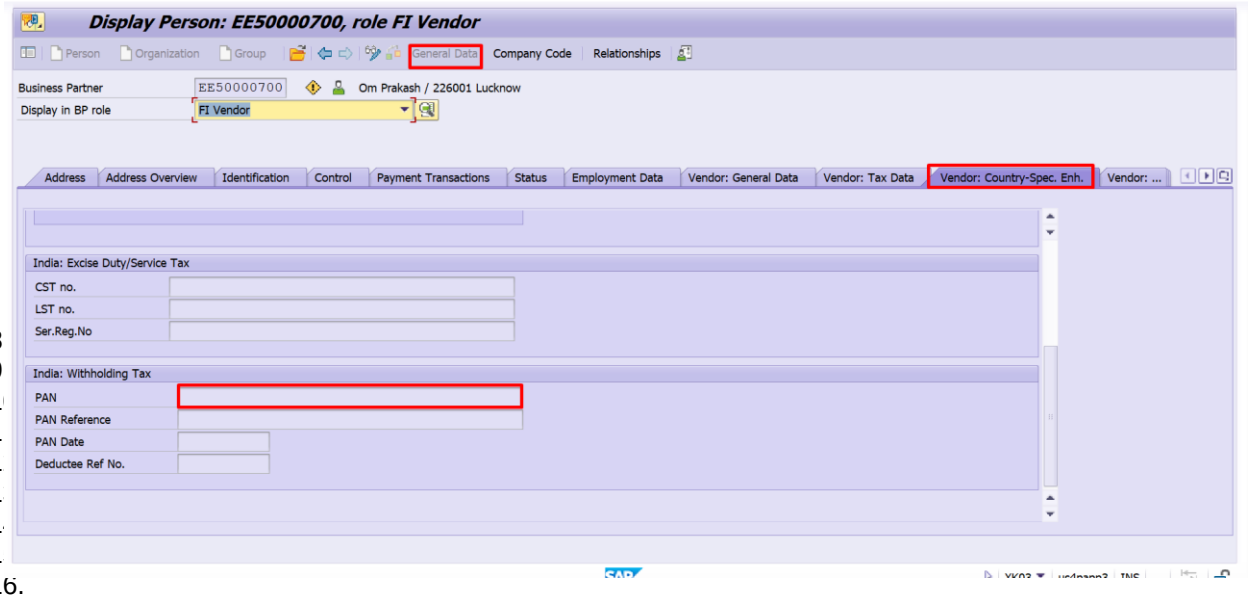


5. Click on Company Code



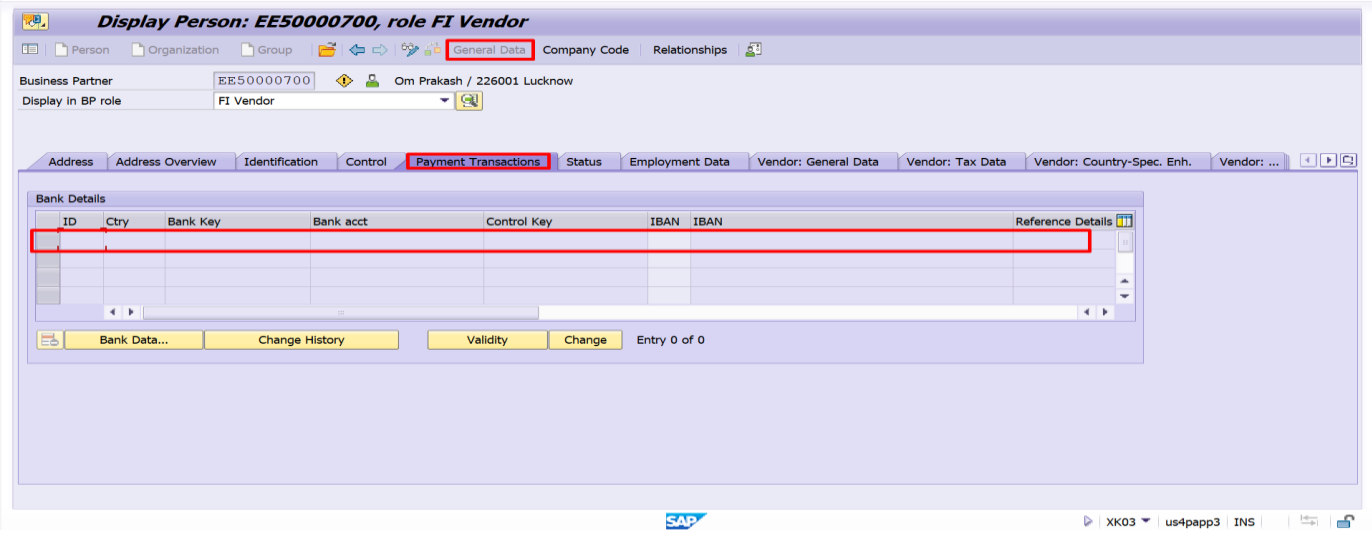


6. Enter Company Code = CPFT; Reconciliation Account = 44.62001
7. Enter PAN details in tab “Vendor: Country-Spec. Enh.

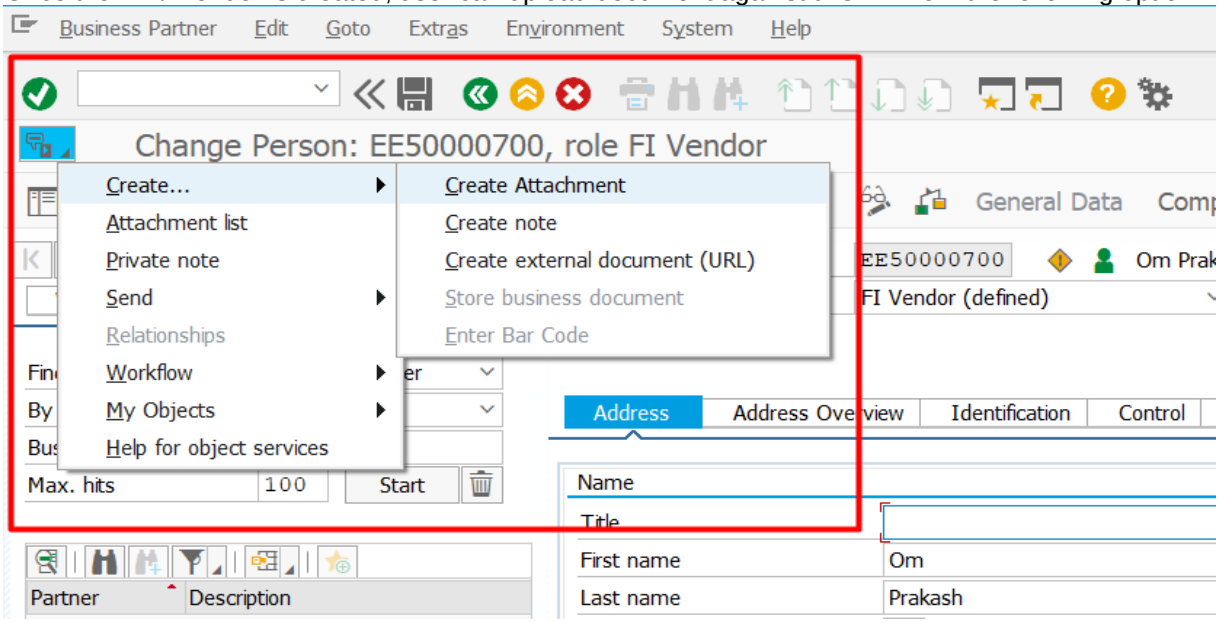


8
9
1
1
1
1
1
16.

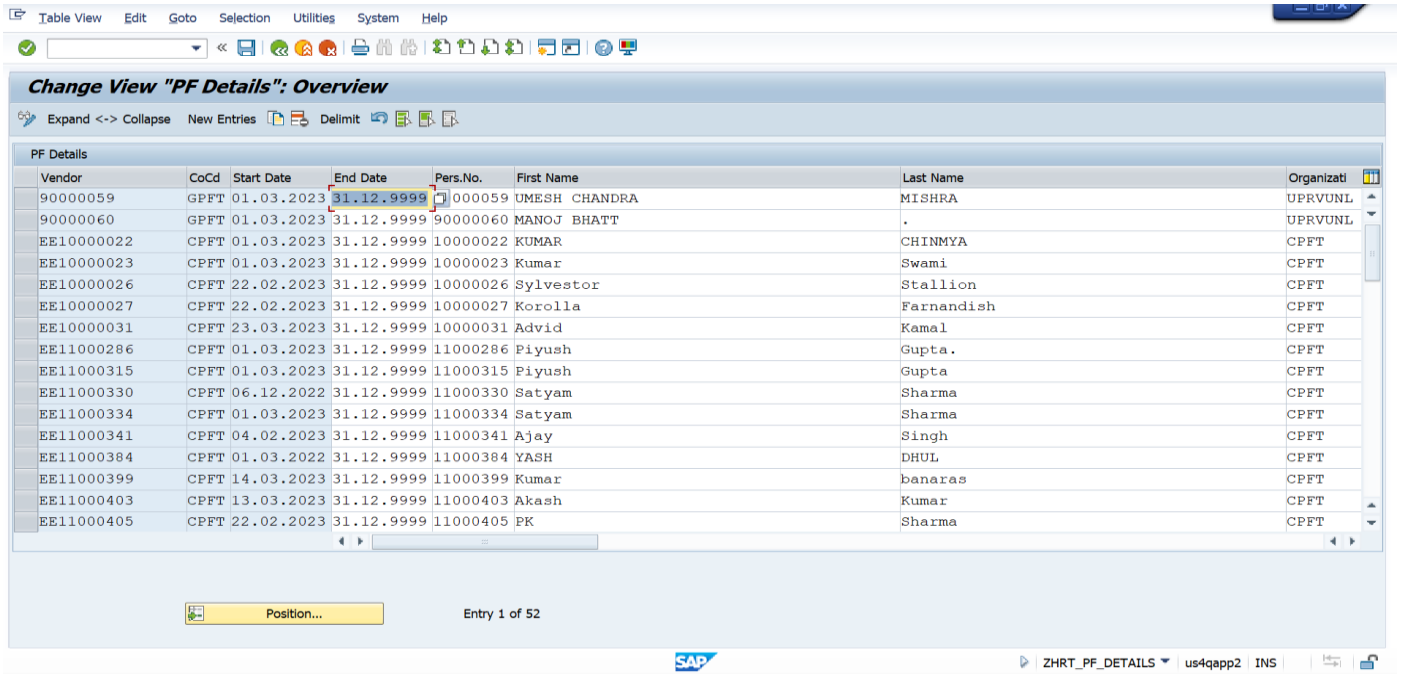
8. Enter bank details for vendor in Payment Transactions Tab



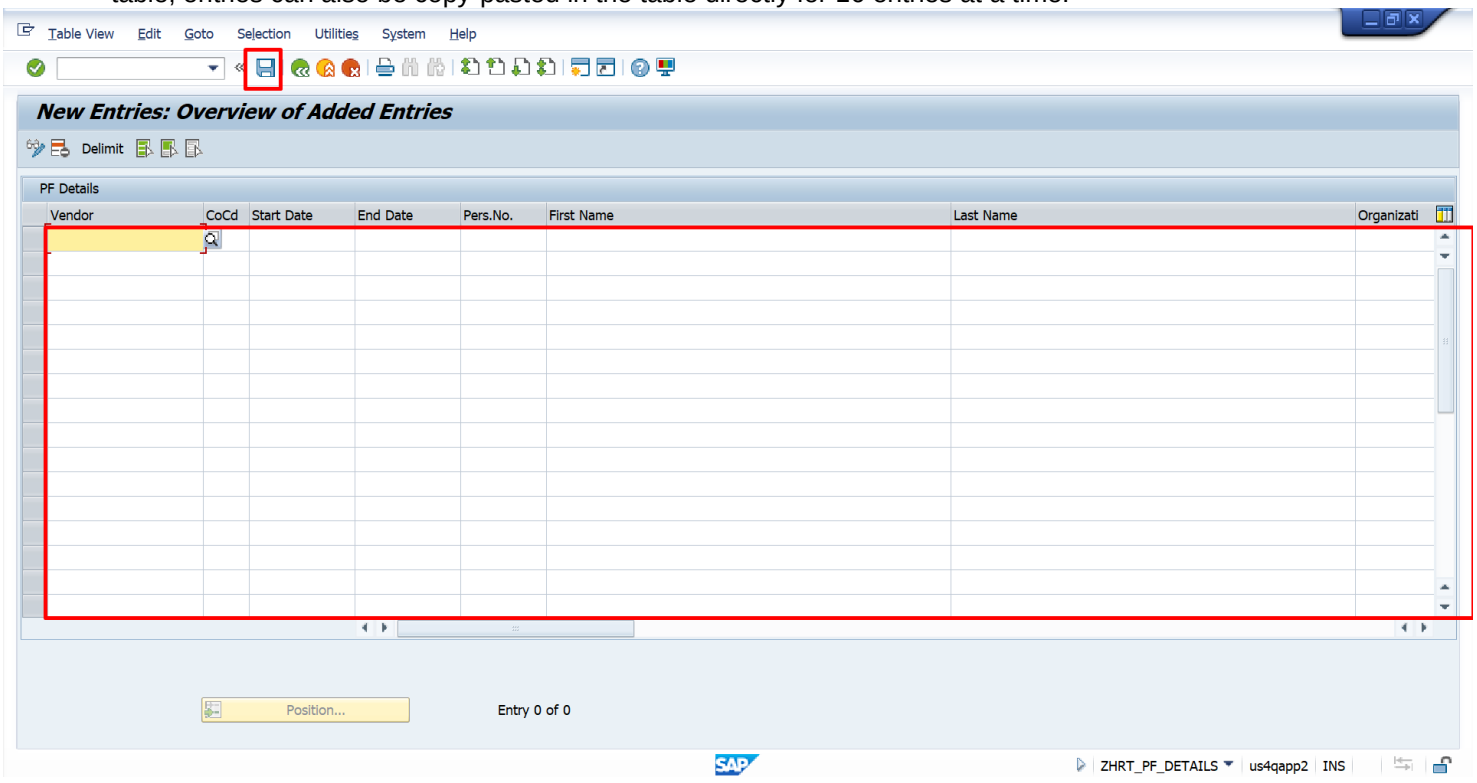
9. Once the BP / Vendor is created, user can upload document against this BP from the following option:



10. Once the BP / Vendor is created use T – Code ZHRT_PF_DETAILS to maintain vendor related details in PF details table.

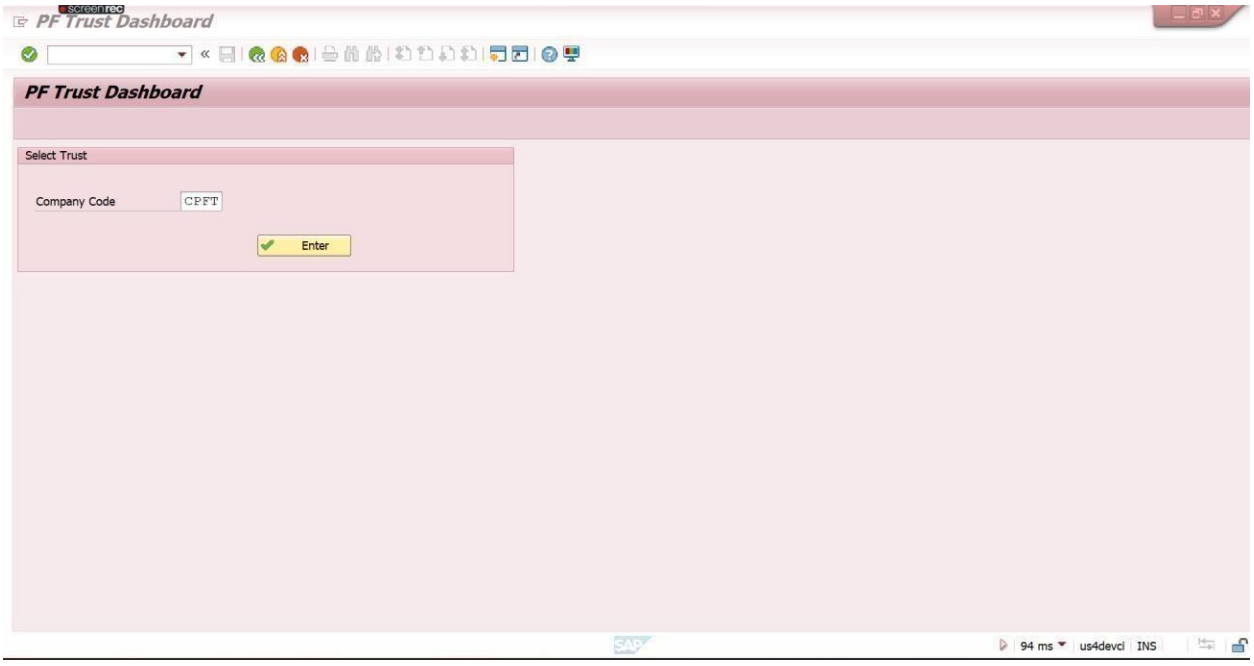


11. Click on New Entries for creating new entry in the table. Add relevant details of the newly created vendor in the table, entries can also be copy-pasted in the table directly for 16 entries at a time.



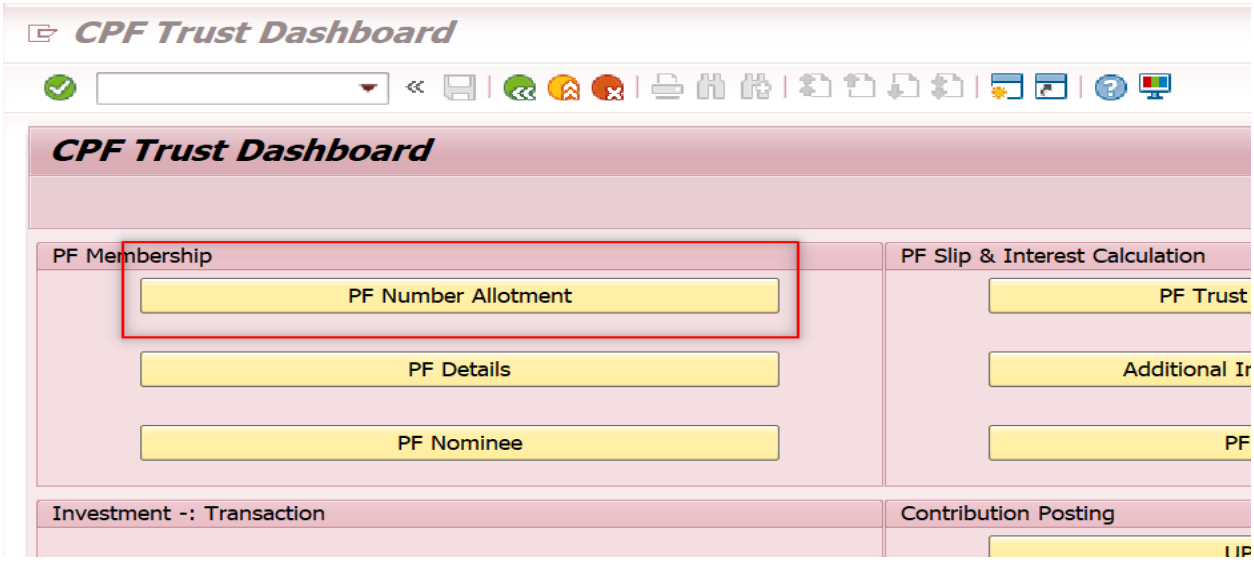
CPF Number Allotment

5. Please enter Transaction Code **ZPF_TRUST**



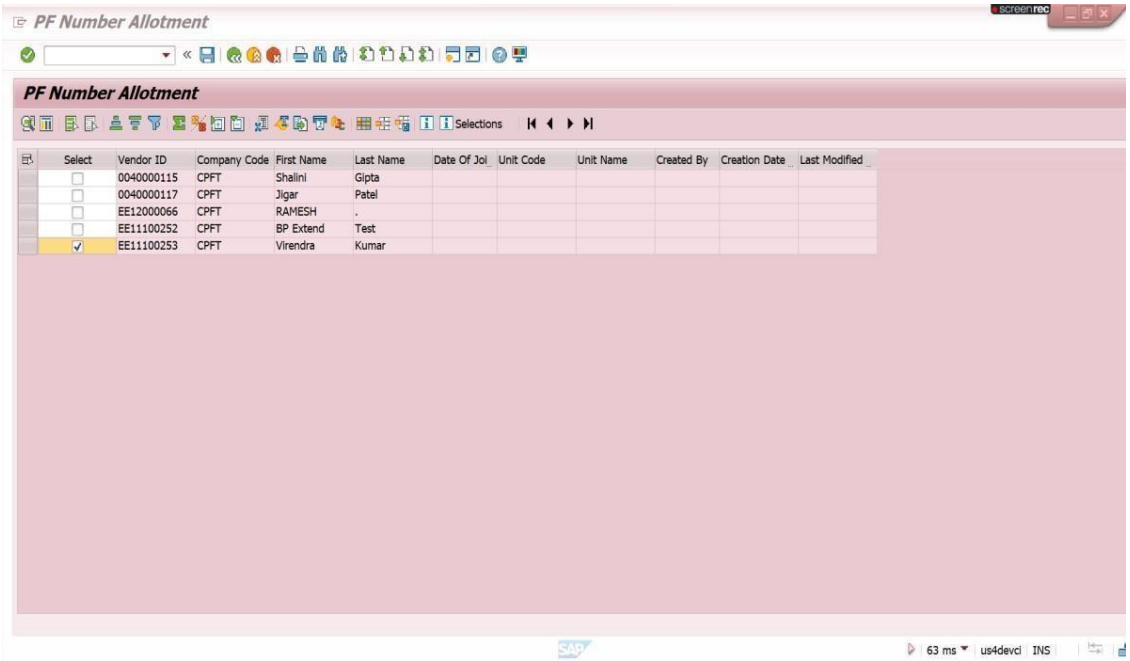
6. Enter Company Code **CPFT** for CPF employees.

7. Please click on PF number Allotment button.

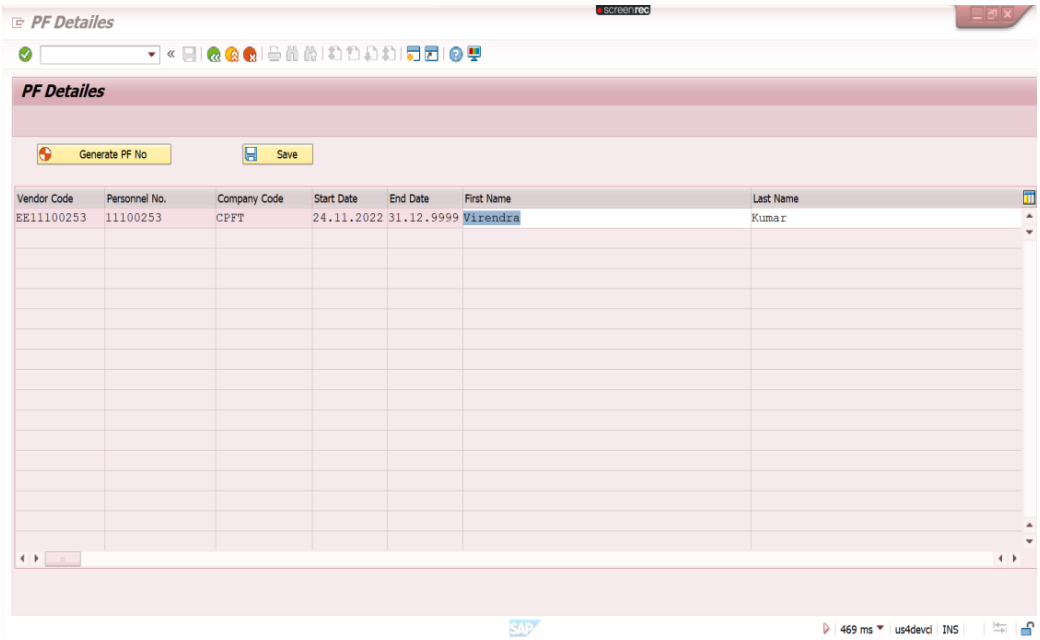


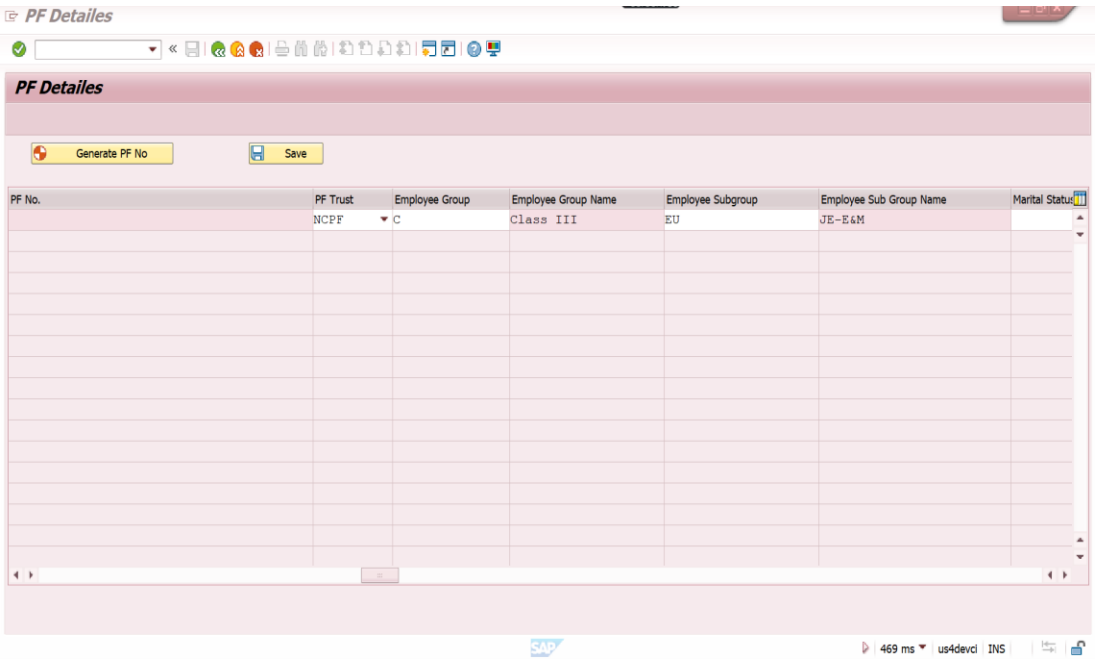
All the newly created personnel numbers will be shown in the screen.

8. Please select the personnel number for whom you want to create and allot personnel number and click on“SAVE” button on top of the screen.

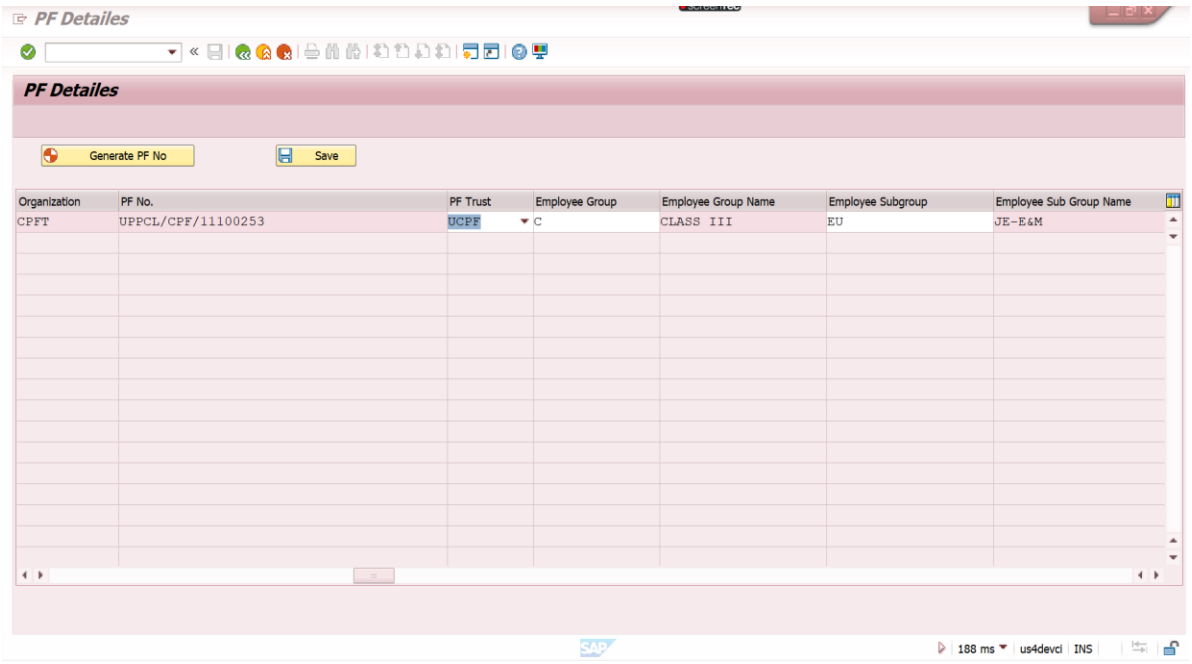


9. Once opened, the below screen appears. We can scroll from left to right and check if all the data of thepersonnel number are correct or not.

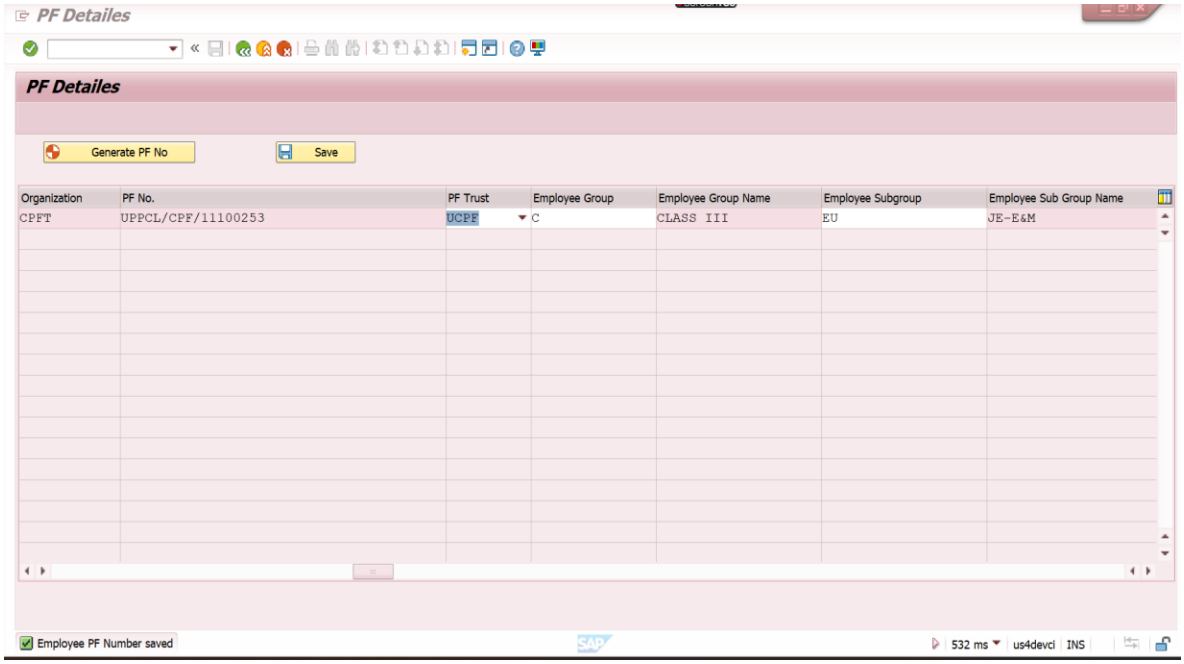




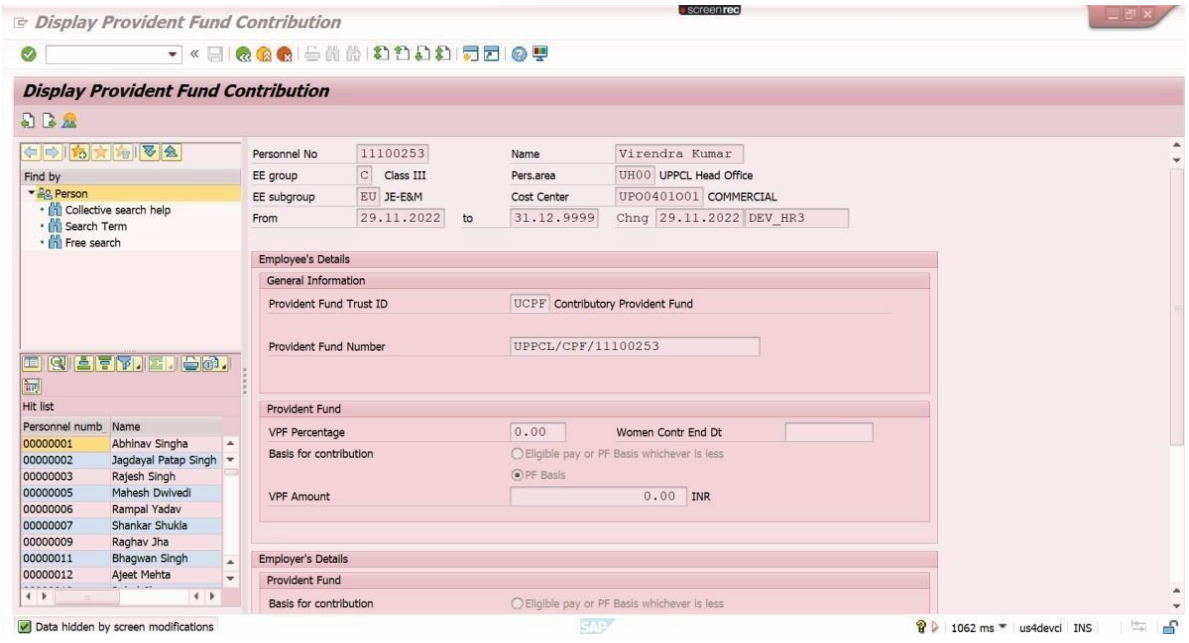
10. Once done, please click on “Generate PF number” once done PF number will generate in the field PF No.



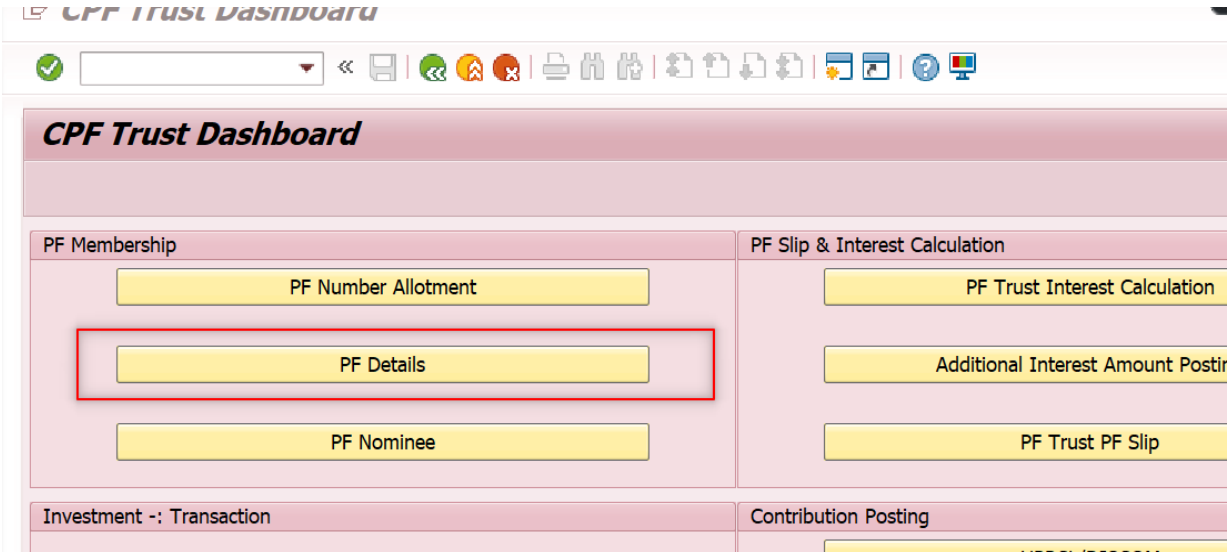
11. Please click on save button. Once saved we will get a message “Employee PF number saved.”



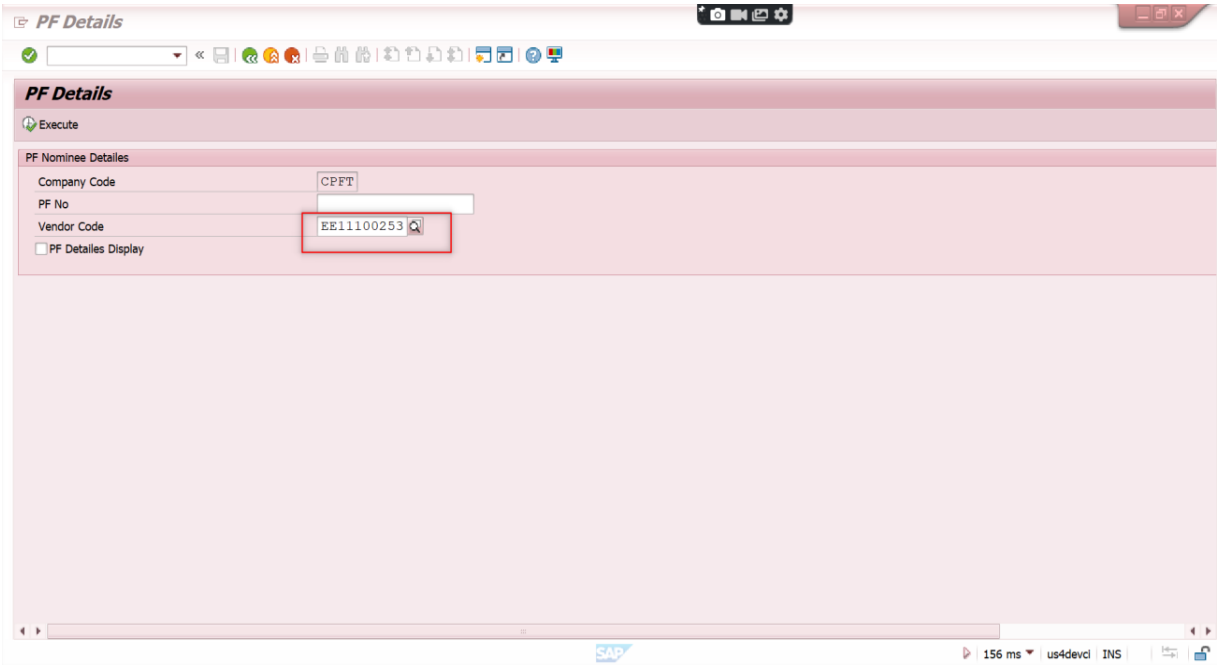
12. The PF number is automatically saved in info type 0587 in PA30 info type.



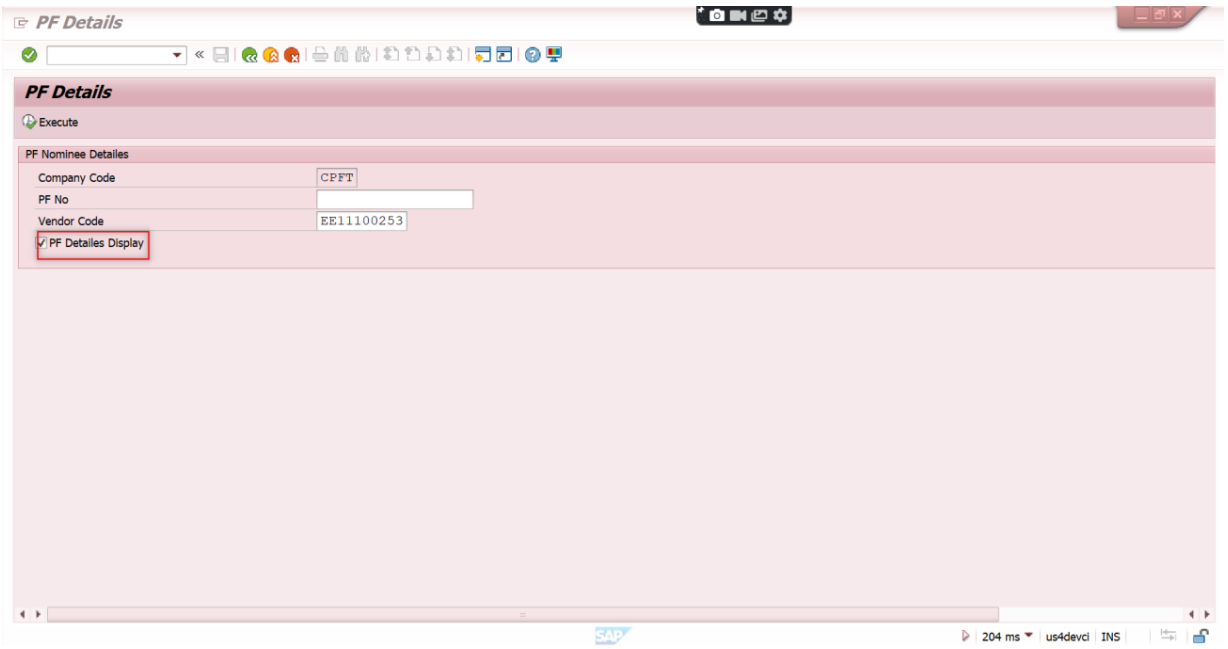
13. Please click on PF details Button to view the PF details of the employee.



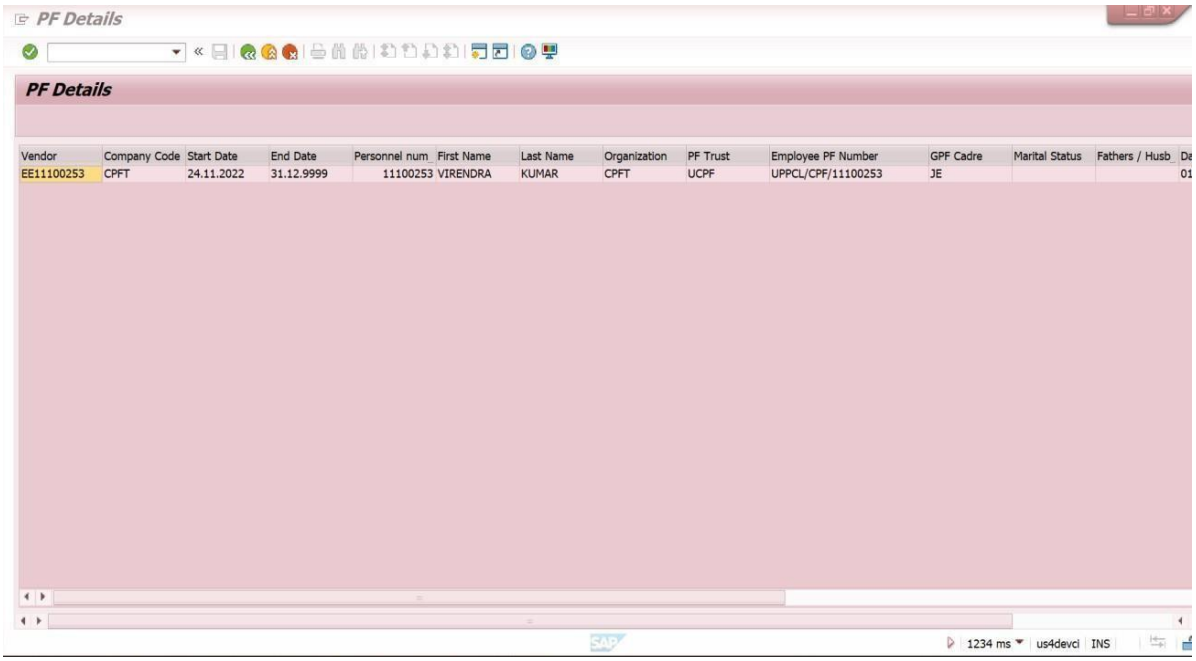
14. Enter the employee vendor code.



15. Please click on PF details display checkbox and then click on execute.

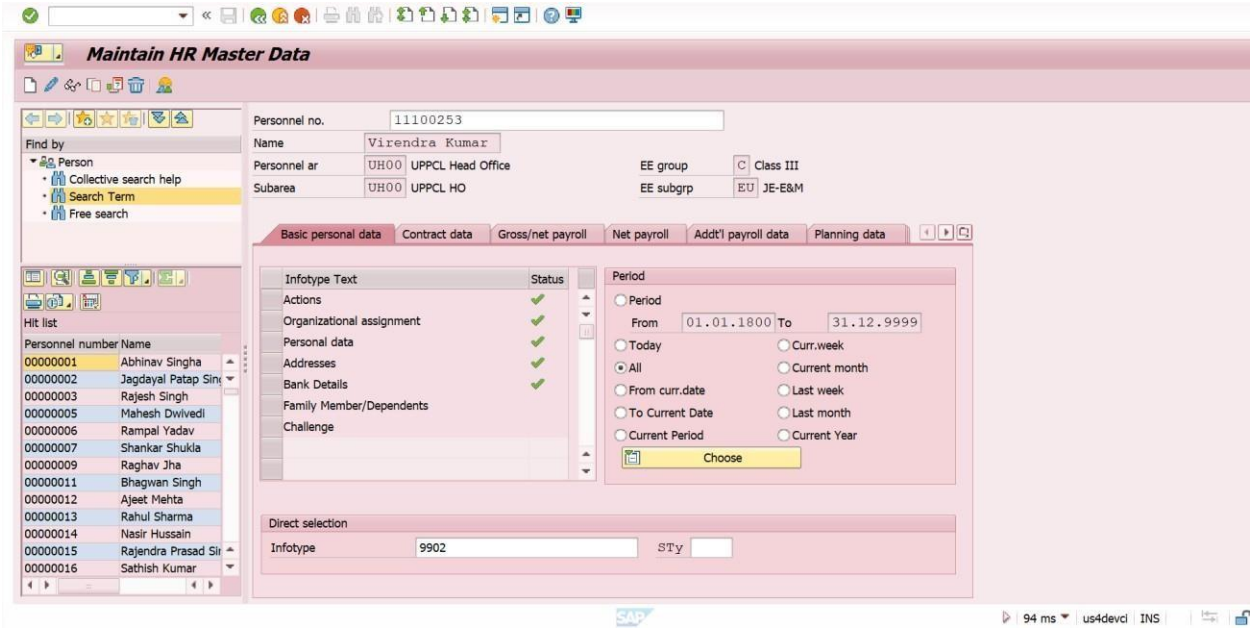


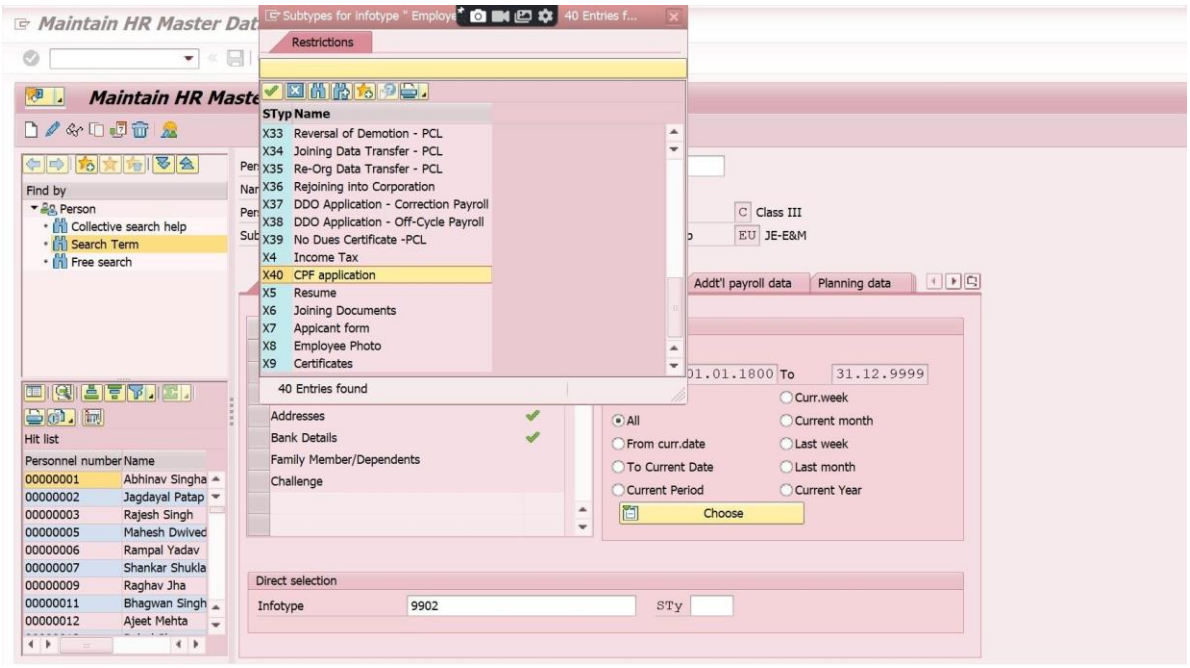
16. Employee's PF details are displayed along with his master data.

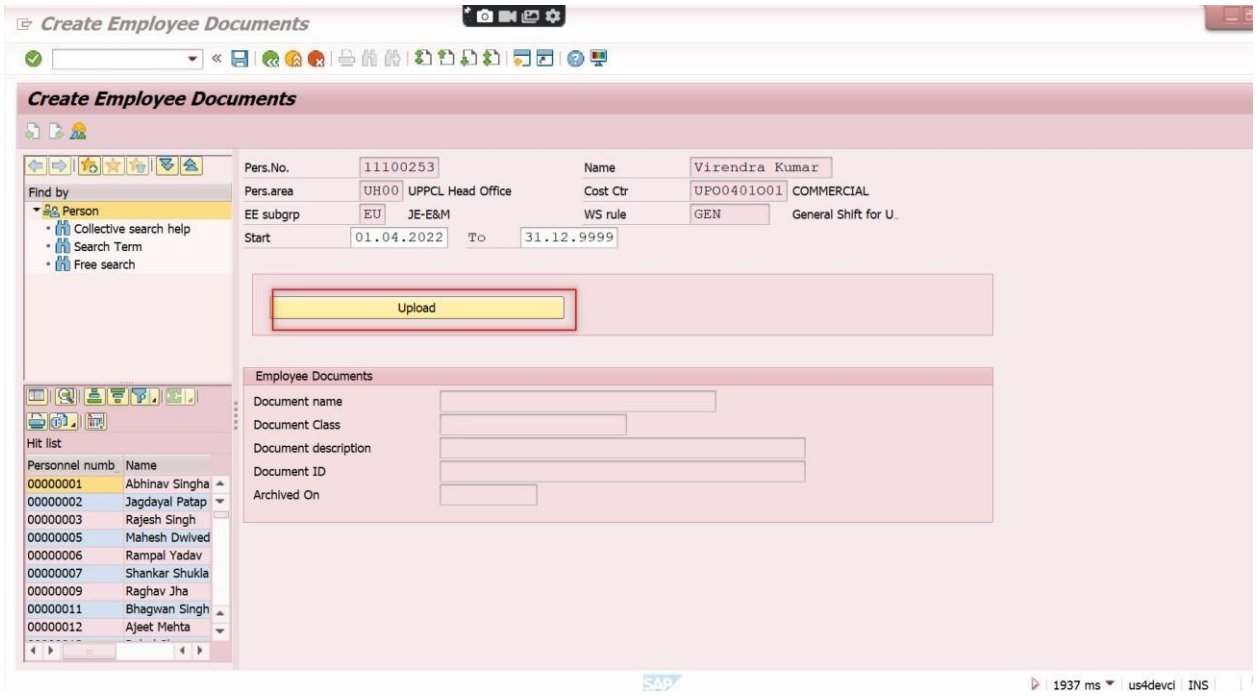


PF Document upload in Pa30 T - Code

User will go to Transaction PA30 after employee creation. He will go to info type 9902, Employee Documents, subtype X40.






Create Employee Documents
Create Employee Documents
Find by
Person
Collective search help
Search Term
Free search
Pers.No. 11100253
Name Virendra Kumar
Pers.area UH00 UPPCL Head Office
Cost Ctr UPO0401001 COMMERCIAL
EE subgrp EU JE-E&M
WS rule GEN General Shift for U..
Start 01.04.2022 To 31.12.9999
Upload
Employee Documents
Document name
Document Class
Document description
Document ID
Archived On
Hit list
Personnel numb Name
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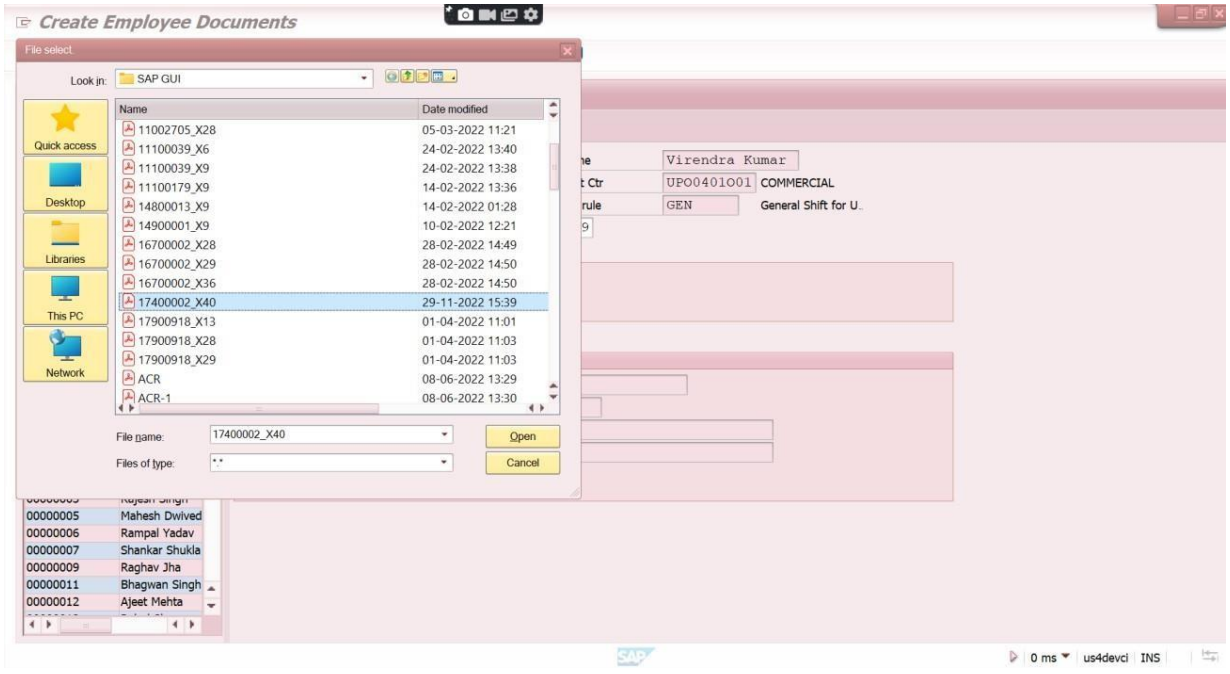
00000002 Jagdayal Patap
00000003 Rajesh Singh
00000005 Mahesh Dwived
00000006 Rampal Yadav
00000007 Shankar Shukla
00000009 Raghav Jha
00000011 Bhagwan Singh
00000012 Ajeet Mehta
1937 ms us4devci INS


Create Employee Documents
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Libraries
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Network
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11100039_X6 24-02-2022 13:40
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11100179_X9 14-02-2022 13:36
14800013_X9 14-02-2022 01:28
14900001_X9 10-02-2022 12:21
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GEN General Shift for U..
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00000007 Shankar Shukla
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00000011 Bhagwan Singh
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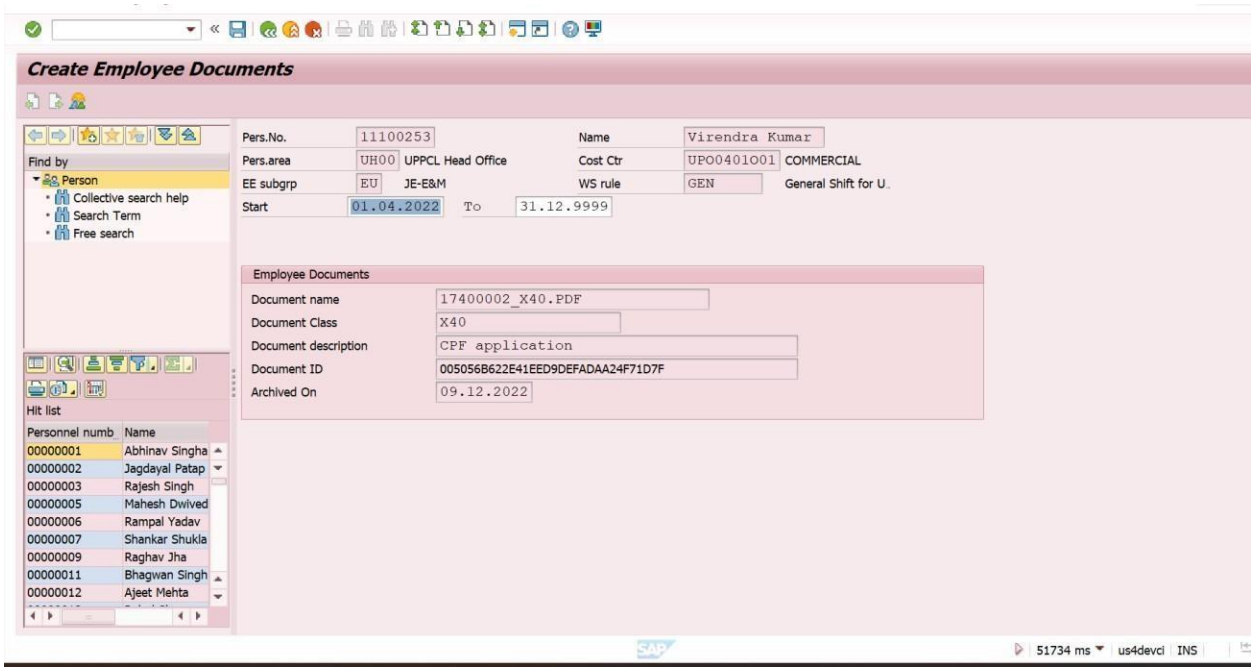
Create Employee Documents
Find by
Person
Collective search help
Search Term
Free search
Pers.No. 11100253
Name Virendra Kumar
Pers.area UH00 UPPCL Head Office
Cost Ctr UP00401001 COMMERCIAL
EE subgrp EU JE-E&M
WS rule GEN General Shift for U..
Start 01.04.2022 To 31.12.9999
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Document Class X40
Document description CPF application
Document ID 005056B622E41EED9DEFADAA24F71D7F
Archived On 09.12.2022
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Personnel numb Name
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00000002 Jagdayal Patap
00000003 Rajesh Singh
00000005 Mahesh Dwived
00000006 Rampal Yadav
00000007 Shankar Shukla
00000009 Raghav Jha
00000011 Bhagwan Singh
00000012 Ajeet Mehta
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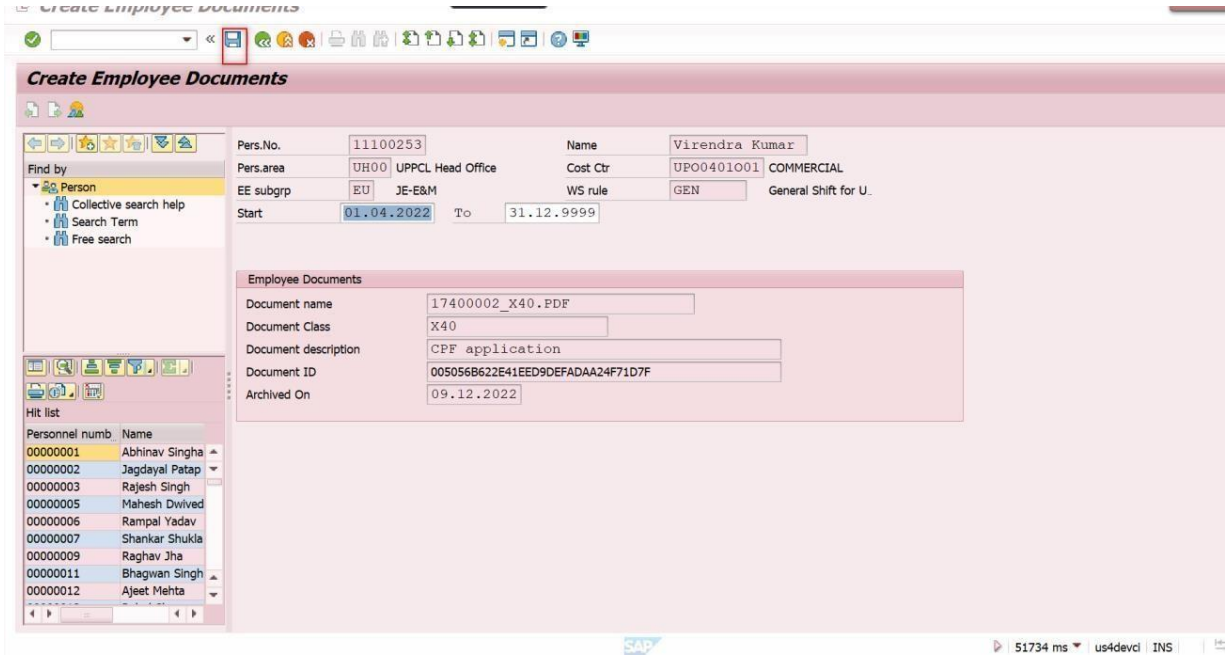
us4devci
INS


Create Employee Documents
Find by
Person
Collective search help
Search Term
Free search
Pers.No. 11100253
Name Virendra Kumar
Pers.area UH00 UPPCL Head Office
Cost Ctr UP00401001 COMMERCIAL
EE subgrp EU JE-E&M
WS rule GEN General Shift for U..
Start 01.04.2022 To 31.12.9999
Employee Documents
Document name 17400002_X40.PDF
Document Class X40
Document description CPF application
Document ID 005056B622E41EED9DEFADAA24F71D7F
Archived On 09.12.2022
Hit list
Personnel numb Name
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00000005 Mahesh Dwived
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00000007 Shankar Shukla
00000009 Raghav Jha
00000011 Bhagwan Singh
00000012 Ajeet Mehta
51734 ms
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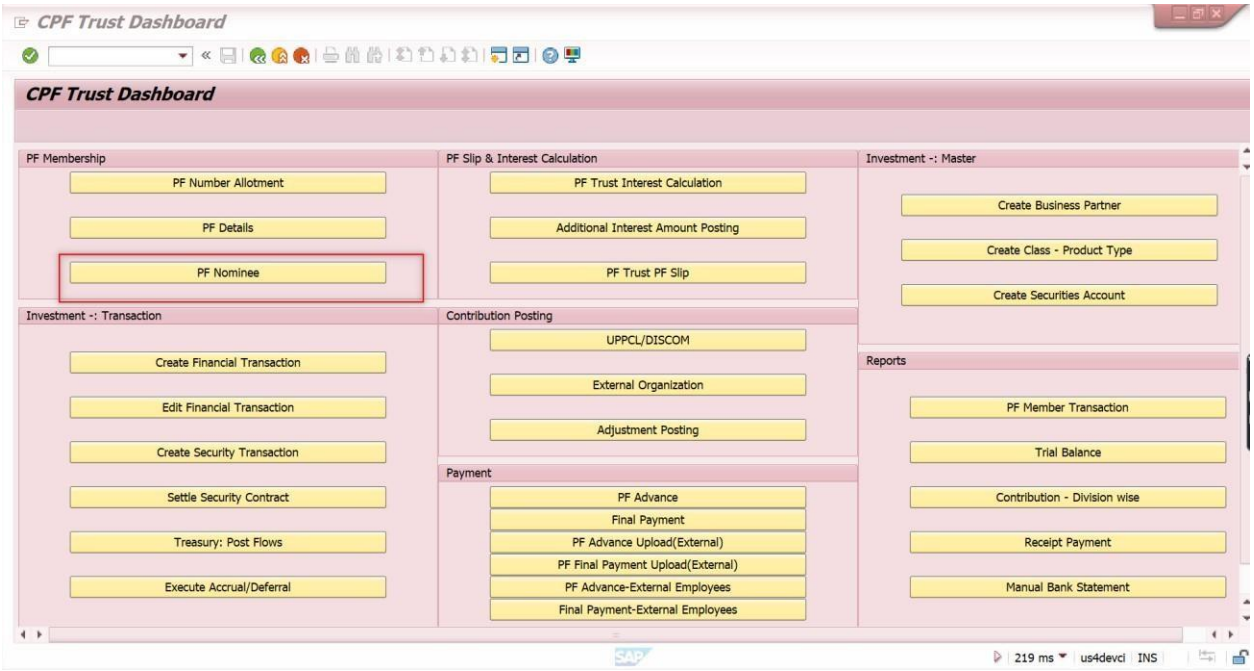
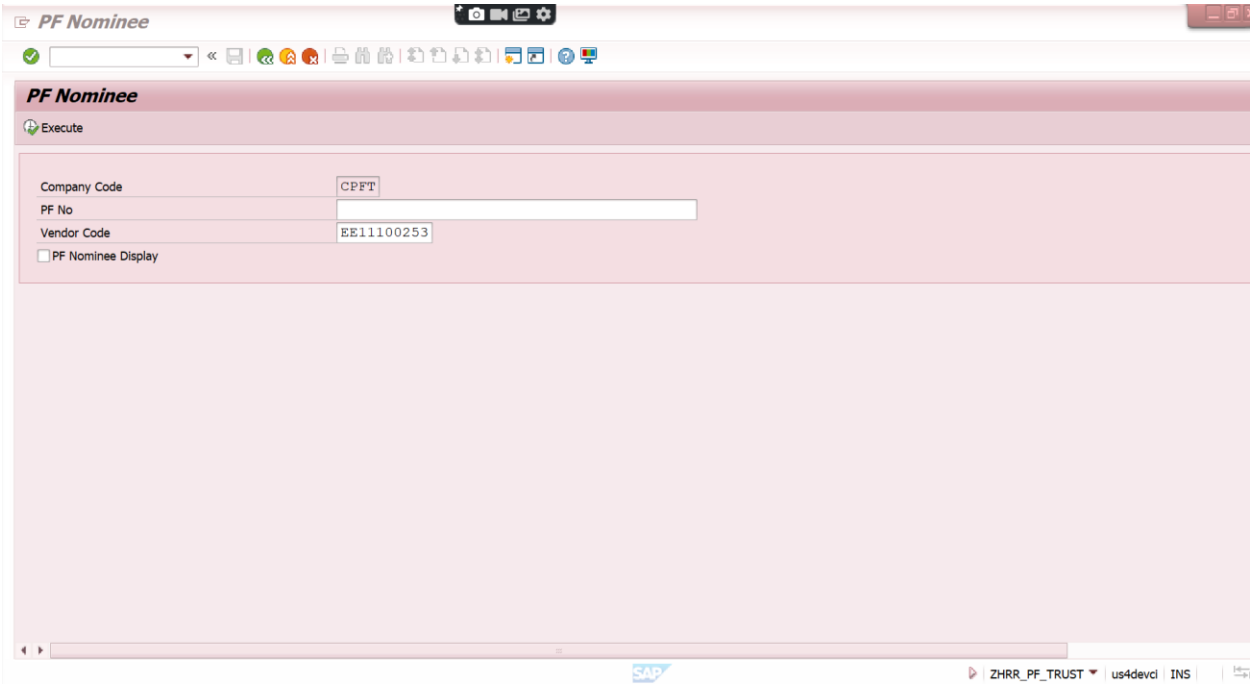
INS

PF Nominee addition and modification

Please select PF Nominee button in the CPF Trust Dashboard.

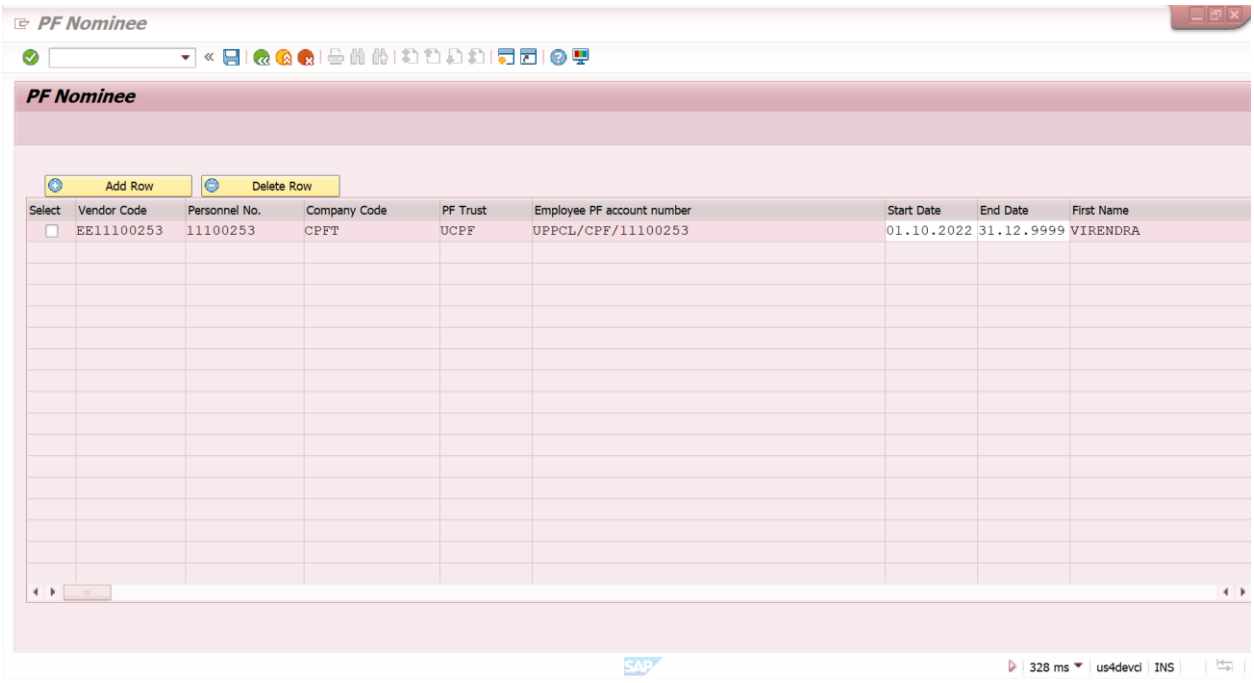


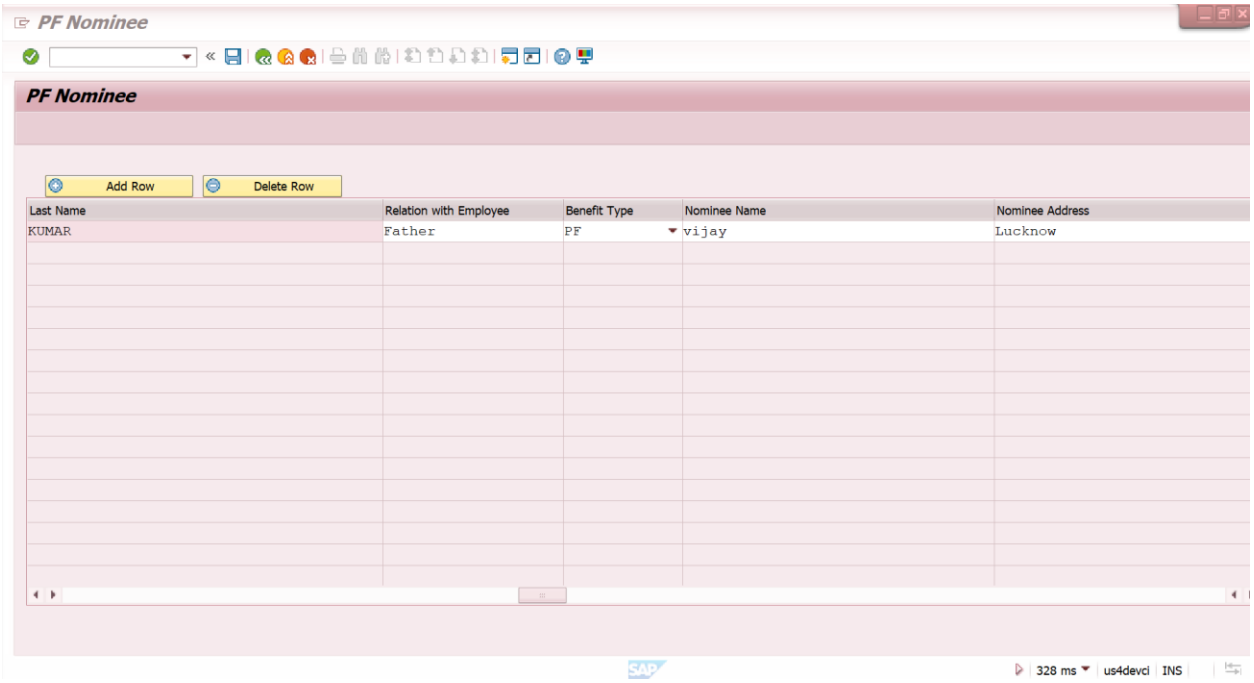
Please enter PF number or Vendor Code and execute.



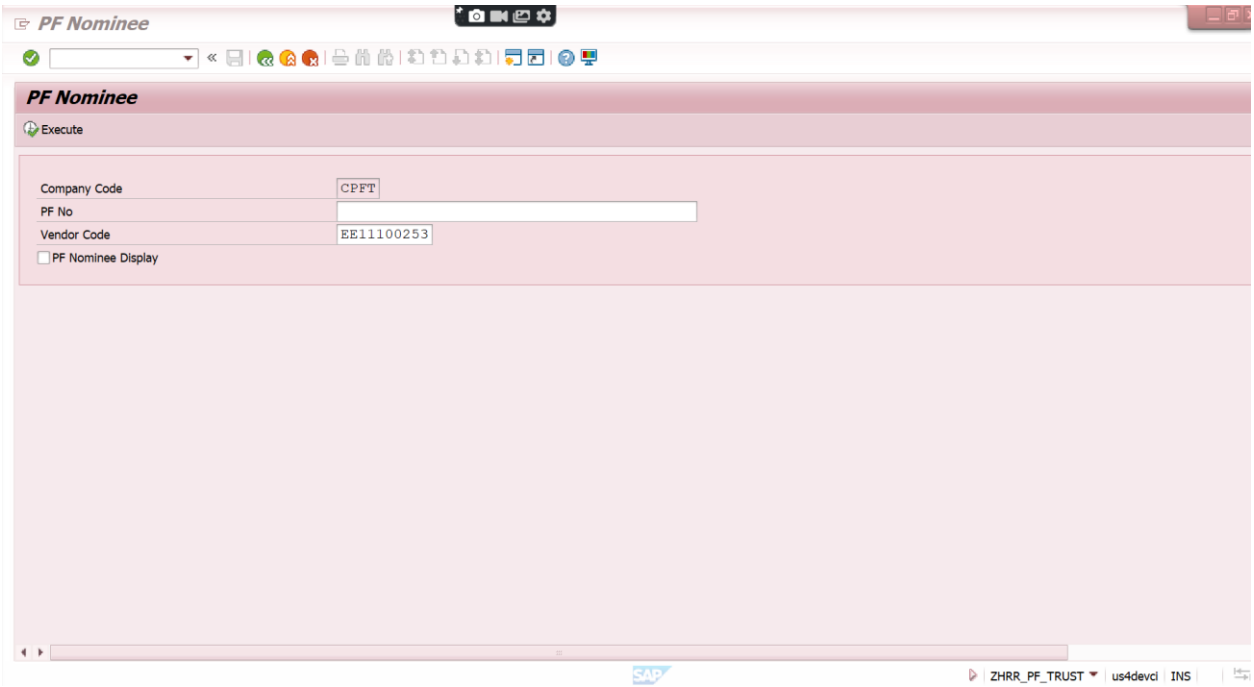
Enter the start date and end date for the nominee to be added. Please enter the nominee's name and

address and percentage share. In case there are more than one nominee, the percentage share should add up to 100.

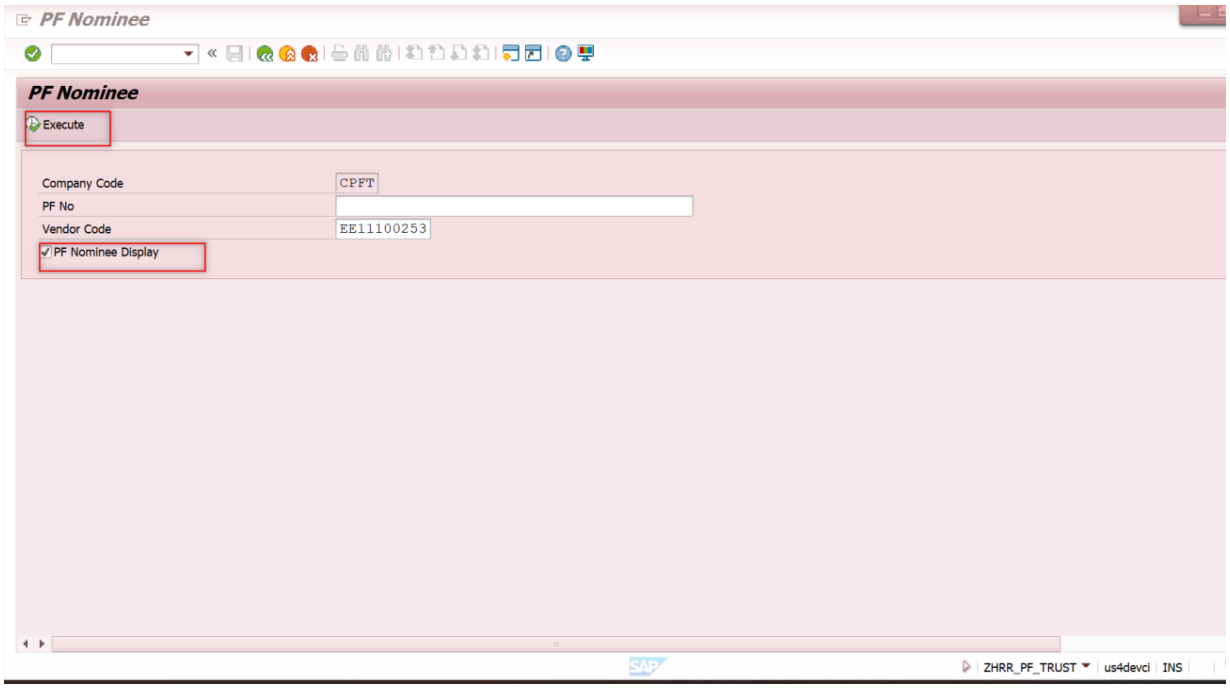




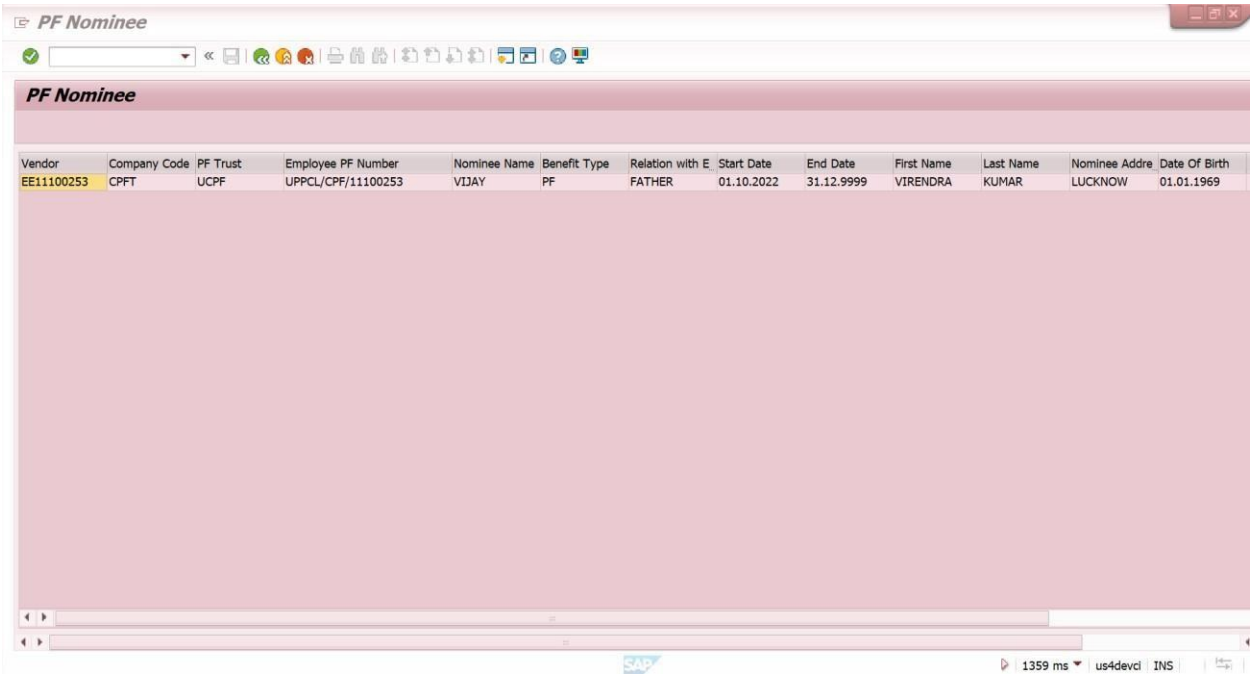
Please click on “save” button. We will get a message “Nominee details are saved.”



Please select the PF nominee Display checkbox and click no execute.



The PF nominee details will be shown in the screen.



4 GLOSSARIES

HRM	Human Resource Management
Company code	SAP term for legal entity for which a complete self-contained set of accounts can be drawn up for external statutory reporting
Personnel Areas (PA)	Personnel Areas are the subunits of a company that are specific to Personnel Administration. Personnel Areas usually defines geographical locations. One Personnel Area can belong to only one Company code
Personnel subarea (PSA)	Personnel subarea represents a further subdivision of the Personnel Area. The principle Organizational aspects of human resources are controlled at this level, like Holiday Calendars, Wages and Allowances, Shift Timings, Leaves Quotas, Professional Tax etc.
Employee group (EG)	Employee group is a general division of employees, which defines the distinct types of workforces and their employment terms and conditions
Employee Subgroups **(**ESG)	Employee Subgroups are subdivision of employee groups. The principle Organizational aspects of human resources are controlled at this level, Wages and Allowances, Shift Timings, Leaves Quotas, Wage Calculation Rules etc.
Payroll Area	Grouping of employees to process Payroll.
SAP	Systems, Applications and Products (in data processing)