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Index
Organizational Management in mySAP HR

Organizational management is a very powerful and flexible component. It not only describes the basis for the personnel planning and development processes, but is also required for optimal implementation of personnel administration, and in particular for personnel controlling. In addition, it offers extensive options for defining and evaluating structures.

5.1 Classification in the Overall System and in HR

5.1.1 Importance for Personnel Administration

Organizational management is actually assigned to the planning components of HR, which are not part of the subject-matter of this book. However, because it represents a utility for structuring even without the use of personnel planning and development, it should be mentioned here. Use of organizational management when using personnel administration is definitely advisable as a basis for structuring and evaluation. In addition, the component serves as an essential basis for evaluations in all other processes and is of particular importance for recruitment. In this context, the complete functional scope is not required. It will suffice to discuss a pragmatic implementation using the following objects, which will be described in more detail in the course of the book.

- Organizational units and their integration in the organizational structure
- Positions, their integration in the organizational structure and the assignment of owners
- Jobs as a means to describe and classify positions

Organizational management is of particular importance in the mySAP HR authorization check. By activating the structural authorization check, it is possible to assign authorizations based on the organizational structure. We will only introduce organizational management in general terms in this chapter. You will find a detailed description in the book “HR Personnel Planning and Development Using SAP” from the same team of authors, also published by SAP PRESS.
5.1.2 Importance for Personnel Planning and Development

The object types mentioned above are an indispensable basis for the personnel planning and development processes. Only event management would be able to function without organizational management, but even it would be extremely limited in terms of carrying out evaluations.

For the remaining processes of personnel planning and development, the basic objects of positions, jobs, and—frequently—organizational units are further characterized with regard to the following attributes:

- Requirement profiles
- Career paths
- Development plans
- Employee goals
- Appraisal models
- Planned costs
- Requirements
- Budgets
- Compensation

5.1.3 Importance for the Decentralized Use of HR

Specific interfaces for decentralized use also require the clean maintenance of the organizational structure in many cases:

- The MDT (Manager’s Desktop) or the MSS (Manager’s Self Service) cannot be used without organizational management.
- In TMW (Time Manager’s Workplace), organizational management can also be used for selecting the employees to be processed. There are other ways of doing this, however.

5.1.4 Importance for R/3 in General

Organizational management is a basis for the following cross-process functionalities:

- SAP Business Workflow
- Assigning roles to users
- Cross-module company organization along with controlling
5.2 Structure of Organizational Management

The Concept of the Plan Version
A plan version describes a specific world from the personnel planning and development view. Different plan versions are specifically used in order to run through alternative planning scenarios. Therefore it is possible to copy plan versions.

The active plan version or integration plan version has a special status. It is only set once during the initial implementation (mostly to 01) and must not be changed after that. The integration plan version is the only plan version whose changes impact the active integration of personnel administration.

In order to change the plan version currently displayed or processed, you can use the menu path Personnel • Organizational management • Settings • Set plan version (see Figure 5.1).

![Figure 5.1 Selecting the Plan Version]

Objects, Relationships, Infotypes
While in personnel administration the “person” represents merely a type of information object, in organizational management different object types are processed. These are, for instance:

- Organizational unit
- Position
- Job
- Task

In addition external object types are also addressed. These represent objects that do not belong to organizational management and are not saved in its object structure, but that are quite important for organizational management. These are, in particular:

- Person from personnel administration
- Applicants from recruiting
- Cost center from cost accounting
In order to create relationships between these objects, relationship types are used. Each relationship possesses specific semantics such as:

- “Belongs to/Incorporates” (between organizational unit and position)
- “Holder” (between position and person)
- “Manages/is managed by” (between position and organizational unit)

This means different structures can be based on objects and relationships.

Infotypes are used in order to further describe objects beyond their structure relationship in the same way as in personnel administration. The infotype concept is very similar to that used in administration, even though the technical implementation deviates in some respects. In particular, not all infotypes are permitted for all object types here. Thus, for instance the Infotype “Vacancy” exists for a position, but not for an organizational unit.

The concept of objects, relationships and infotypes described here also applies to the other processes of personnel planning and development. Here, in particular, object types of different processes (e.g., organizational units and events) can be related to each other. The same infotype can also be used for objects of different processes. The number range for infotypes in personnel planning and development ranges between 1000 and 1999.

Customizing for objects, infotypes, and relationships is carried out via IMG path Personnel management • Organizational management • Basic settings Enhancement • Data modeling. For our present purpose, i.e., to use organizational management in a simple form as a basis for personnel administration and personnel controlling, no settings are required there.

**Selected Object Types**

**Organizational unit**

Basically, an organizational unit is an object of the organizational structure that has not been further specified. It can represent a business area, a team, an authority, a plant, or a department, among other things. This very general definition enables you to map as far into the depth of an organizational hierarchy as you want by using superordinate and subordinate organizational units.

**Position**

In simple terms, a position is a place that a specific employee can occupy. A position can also be vacant, which means for recruitment that personnel are required and an employee should be searched for. Positions are assigned to an organizational unit by the relationship type “belongs to.”
The chief position has specific characteristics. The owner of this position manages the corresponding organizational unit. From a technical point of view, a chief position emerges when a link of the type “manages” is created between a position and an organizational unit. The chief position is important in many areas. For example, it can be used in order to assign specific tasks in Workflow, to identify the manager for the Manager’s Desktop (see Section 13.3), or to grant access rights to subordinate employees via the structural authorization check.

A job can be regarded as a prototype or template for a position. While for instance, “loan officers” usually describes a job, “loan officer no. 3 in the commercial real estate department” is a position. In general, jobs and positions are named in the same way. In the example, the position would therefore also be called “loan officer.” However, you can ascertain which position is meant from the hierarchical classification in the organizational structure. Jobs and positions are linked via the relationship types “describes” or “is described by.” Thus the job concept provides a structure for the positions which can also be used for evaluation purposes.

**Selected Infotypes**

In many maintenance interfaces, the individual infotypes rarely appear. They are rather integrated in cross-application interfaces in order to align the process of the daily maintenance work with the tasks of a user role. You can reach the maintenance for individual infotypes through the menu path **Personnel • Organizational management • Expert mode**. Maintenance screens are provided there for organizational units, jobs, and positions for infotypes (see Figure 5.2). Under the menu item **General**, you can maintain infotypes for any objects.

The Infotype “Object” represents the object itself. It contains a name and an abbreviation, which may change over time. An object can be clearly identified using an eight-digit object ID. Infotype 1000 is thus comparable to Infotype 0002 in personnel administration. The name and abbreviation correspond to the name of an employee and the object ID of the personnel number. Figure 5.3 shows Infotype 1000.
Relationships are also stored in an infotype where the relationship type represents the subtype. Direct maintenance of Infotype 1001, however, is an exception. The integrated maintenance interfaces enable reassignments, relationships, and simultaneous regeneration with relationships, without the direct maintenance of Infotype 1001. The infotype contains the relationship type and the related object (see Figure 5.4).
When a relationship is created, the corresponding relationship is also automatically created in the opposite direction. Thus, if the relationship "Position belongs to organizational unit" is created, the system automatically also creates "Organizational unit comprises position." Figure 5.5 shows the inverse relationship that corresponds to Figure 5.4.

Infotype “Department/staff” enables you to identify an organizational unit as a staff unit. This can be evaluated and displayed in a graphic. In addition, these department IDs can also be used to distinguish real departments from groups. This affects both evaluations and the integra-
Information on the vacancy is an essential element of manpower-requirement planning and recruitment. In order to be able to really support requirement planning, the vacancy should be created as soon as the departure or transfer of an employee becomes known. This generally occurs automatically in the action “Organizational change” or “Leaving.”

The infotype itself contains a status indication for the vacancy (see Figure 5.7). **Open** means that the search for personnel can begin immediately, while **Vacancy filled** doesn’t require any immediate action.

### 5.2.1 Designing the Organizational Structure

The organizational structure is initially created via the menu path *Personnel • Organizational management • Organizational structure • Organization and staff assignment • Create*, in order to publish the root of the structure. You then can carry out further maintenance through the path *Personnel • Organizational management • Organizational structure • Organization and staff assignment • Change*. 
To a large extent, the integrated maintenance interface abstracts from the infotypes, and is divided into four areas (see Figure 5.8). Due to the split-screen technology, the four areas can be enlarged or reduced using the mouse, as is required for the current activity.

The upper left-hand pane is used to select objects and works like the Object Manager in personnel administration (see Figure 5.9).
The lower left-hand pane manages the pool of objects already selected (see Figure 5.10). These can be selected as root objects for the work area or can be assigned to objects of the work area by Drag&Drop.

The actual work area is located in the upper right-hand pane. There you can use the Goto button to change between different views. In particular you can change between the pure organizational structure and the staff assignments (see Figure 5.11).

Figure 5.10 Object Pool

Figure 5.11 Staff Assignments in the Work Area
The following functionalities are available here:

- Creating, reassigning, delimiting, and deleting organizational units
- Creating, reassigning, delimiting, and deleting positions
- Changing the display sequence
- Assigning cost centers
- Assigning management functions
- Selecting objects for the details area

If you selected an object for the details area by double-clicking on it, different maintenance functions are available in several tabs (see Figure 5.12). Which tabs are available depends on the object type and the customizing settings.

This configuration of the entire maintenance screen occurs via the IMG path Personnel management • Organizational management • Hierarchy framework.

![Figure 5.12 Maintenance via Tabs](image)

### 5.2.2 Integration with Personnel Administration

The functionalities described so far are sufficient for supporting personnel administration and personnel controlling. The functionality of the integration is described in more detail in Chapter 4, Personnel Administration, in correlation with Infotype 0001. Nevertheless here are some important remarks on integration:

- The teams which maintain the organizational management and personnel administration in the system must be completely aware of the integration aspects, as well as their effects on the work of their colleagues.
Note that retroactive organizational changes trigger recalculations in remuneration payroll that may lead to extensive adjustments in cost accounting.

You should also pay particular attention to the integration with recruitment and manpower requirement planning. These are based on the following prerequisites:

- Vacancies must be maintained in a timely and correct manner.
- Vacant positions must be delimited if they are definitely no longer required.
- Positions for new employees must be created and correspondingly named.

For a simple implementation of organizational management, as we seek to enable in this book, no customizing settings are required at first except for the definition of the integration itself via the characteristic PLOGI and the entries in the system table T77S0 for the group PLOGI.