

DRAFT



OnePurdue
HR Organizational Management

Overview of Organizational Management
Objects in SAP

Version 1
March 2, 2006

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General Information

The HR Organizational Management component of the SAP system creates a structure that illustrates the following:

- The departments or organizational units existing at Purdue.
- The positions linked to the departments or organizational units.
- The jobs and job attributes linked to the positions.
- The positions held by employee.

Organizational Management Objects

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual characteristics. These objects are created and maintained separately, then linked together through relationships to form a network which has the flexibility to handle human resource forecasting, and reporting.

In the Organizational Management modules, additional characteristics (or custom objects) can be created and assigned to objects. These custom objects provide additional descriptive information which can be used for reporting and other purposes.

There are five basic building blocks in the Organizational Management modules. The table below defines the object types and object type keys used by the system.

Object Type	Object Type Key
Organizational Units	O
Jobs	C
Positions	S
Cost centers	K
Persons	P

Following is more detailed information about the five basic Organizational Management objects.

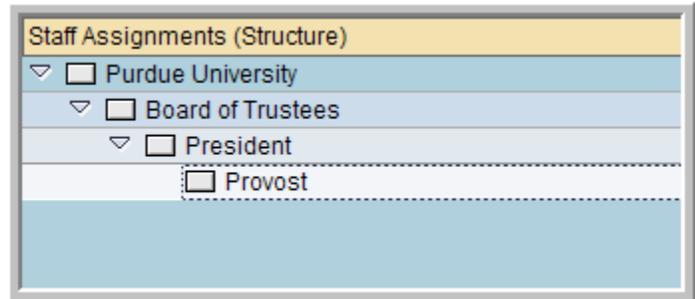
Organizational Units (O)

Organizational units describe the different business areas within the University. Organizational units must exist in the organizational structure and be linked to one another within the SAP system to allow the creation of a hierarchical structure of the organization and a network or relationship between the units. The structure may also be used for the creation of an organizational plan.

Organizational units provide the structure to which positions will be linked. All positions at the university will be linked to an organizational unit.

Organizational units are not the same as other enterprise units such as personnel area, employee area, company code, etc. These other enterprise units provide structures in the Personnel Administration or Payroll Accounting areas of the SAP system.

To the right is a sample of the organizational unit hierarchy that can be established in SAP.



Organizational Unit Relationships:

HR organizational units will have relationships established to other organizational units as well as to positions and other objects. These relationships will facilitate the unique reporting needs across the University. Following are the relationships created to organizational units.

- ❖ Organizational Unit to Organizational Unit
- ❖ Organizational Unit to Position
- ❖ Organizational Unit to Personnel Org Code
- ❖ Organizational Unit to Affirmative Action Org Code
- ❖ Organizational Unit to BA School
- ❖ Organizational Unit to BA Cluster
- ❖ Organizational Unit to CIP Code
- ❖ Organizational Unit to Faculty POC Code
- ❖ Organizational Unit to HR Team Code
- ❖ Organizational Unit to Cost Center

Jobs (C)

Jobs are general classifications or groupings for sets of tasks or functions an employee is required to perform. Across the University there are several hundred different jobs. Examples of jobs include Associate Professor, Business Administrator, and Secretary IV. Each of these has its own distinct set of knowledge, skills, and abilities.

Jobs will be defined by JIC and JIC titles for A/P and C/S, and newly defined codes for Faculty.

For a sample Job listing, please see Appendix A.

Job Relationships

Jobs will have relationships or attributes established to other objects, just as organizational units have relationships. Jobs will have the following relationships:

- ❖ Job to Title
- ❖ Job to Exemption Status
- ❖ Job to EEO Code
- ❖ Job to POC code
- ❖ Job to Job Group
- ❖ Job to Job Family
- ❖ Job to Job Subfamily
- ❖ Job to Staff Group
- ❖ Job to FOC/Census Code
- ❖ Job to Pay Grade
- ❖ Job to CCRC
- ❖ Job to Background Check

Each unique occurrence of this combination of attributes constitutes a separate Job.

You will note that a Job is not associated with a specific organizational unit. Instead, a job serves as a template for creating positions in organizational units. Job attributes are inherited by the positions associated with each job.

Positions (S)

Positions are specific instances of jobs. Positions are tied to organizational units and are held by individuals within the University. Multiple positions may perform similar job tasks. Each position is typically held by one employee; however, a position may be filled by more than one employee. Examples of positions are Associate Professor-Agronomy, Business Manager-Engineering, and Secretary IV-Management. Positions will inherit the attributes related to the job that describes them, and may also have more specialized attributes (relationships) than the job level.

One - One Positions

A position held by one employee, 1-to-1, allows for position-to-position relationship building. This means we can link one position to its supervisory position and have the ability to create workflow routing for time approval. It also allows us to create real-time organization charts for reporting purposes. These positions inherit titles from the job level, but can be custom titled to better describe the position. Examples of 1-to-1 positions are all clerical, service, A/P, and tenured/tenure track faculty positions.

Grouped Positions

A position that has more than one employee linked to it is a grouped position. In grouped positions, the position inherits the title from the job level and there is no option for a custom title. The advantage of a grouped positions is that the position will already exist in the org structure

for ease of hiring, especially for high volume staff groups. Grouped positions are common within the following staff groups:

- ❖ Graduate Staff
- ❖ Residence Hall Counselors
- ❖ Visiting Faculty
- ❖ Limited Term Lecturers
- ❖ Post Doctoral Staff
- ❖ Adjunct Staff
- ❖ Courtesy Staff
- ❖ Associate Staff
- ❖ Affiliate Staff
- ❖ Visiting Scholars
- ❖ Interns
- ❖ Residents
- ❖ Students

Position relationships will include position to organizational unit, job; county; etc.

Cost Centers (K)

Cost centers are maintained in Financial Accounting. Each organizational unit will be either assigned a default cost center or will inherit a default cost center from the supervising organizational unit.

The default cost center, in combination with a fund, will be used as the default payroll account for the organizational unit. The default cost center will ONLY be used if the cost distribution data for an employee is invalid at the time of payroll posting.

The default cost center assigned to the organization unit will also be used during the Budget process to extract employees into the correct budgeting groups.

Prior to making any changes to default cost center assignments, it is critical that the changes be confirmed with the Financial Accounting and Budget areas.

Persons (P)

Persons are objects that hold positions within an organizational structure. In other words, persons are the employees in each organizational units.

Persons are linked to the organizational structures via their assignment to a position. Information for persons is maintained in the Personnel Administration (PA) modules of the system.

The Role of Relationships in Organizational Management

Relationships can be created between the organizational management objects. Several linked objects will form a structure.

Relationships between objects can be either reciprocal or in only one direction. Examples of relationships between objects includes the following:

Object Relationships	Description	Relationship Type
O to O (Org Unit to Org Unit)	The Provost Dept reports to the President Dept. and the President Dept. is line supervisor of the Provost Dept.	Reciprocal
C to S (Job to Position)	The job describes the position and the position is described by the job.	Reciprocal
S to O (Position to Org Unit)	The position belongs to the org unit and the org unit incorporates the position.	Reciprocal
K to O (Cost Center to Org Unit)	The cost center is assigned to the org unit.	One Way

Relationship Keys

The relationships used between standard SAP object types are predefined and should not be changed.

Each relationship in SAP will have a three digit key in combination with either an A or B. When the user builds the first relationship, the reciprocal relationship is assumed by the system when appropriate. Examples of relationship keys follow:

Allowed Relationship	Relationship Direction	Relationship Key	Relationship Description
O to O (Org to Org)	A (Child)	002	Reports to
O to O (Org to Org)	B (Parent)	002	Is Line Supervisor of
S to O (Position to Org)	A (Child)	003	Belongs to
S to O (Position to Org)	B (Parent)	003	Incorporates
C to S (Job to Position)	A (Child)	007	Describes
C to S (Job to Position)	B (Parent)	007	Is Described by

For a comprehensive listing of SAP relationships, please review the relationships established in the SAP system.

Maintaining Organizational Management Data

SAP allows the user to maintain organizational objects through numerous ways. Following is an overview of the methods for maintaining data.

Transaction Code PPOME - Organization and Staffing Changes

The transaction code PPOME allows the user to view the data in a hierarchical view. Objects can be created or maintained in this view.

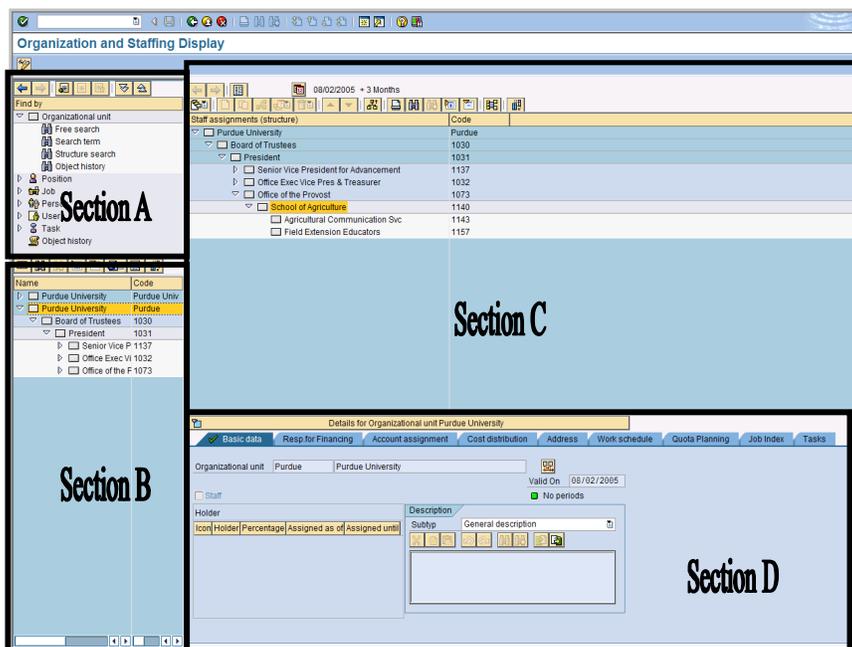
The screen contains four distinct sections. Descriptions of the sections are below.

Section A allows the user to search for objects in the system. By clicking on the particular object, the user may conduct a variety of searches.

Section B displays the results of the search.

Section C displays the specific search result that is highlighted in Section B.

Section D displays the specific item highlighted in Section C.



Transaction Code PP01 - Maintain Object

This transaction code will take the user directly to the Maintain Object screen. The user may select the object and modify or add information as necessary.

This transaction code may be used to add new objects or create additional relationships to the object.

Following is a screen shot of the Maintain Object transaction.

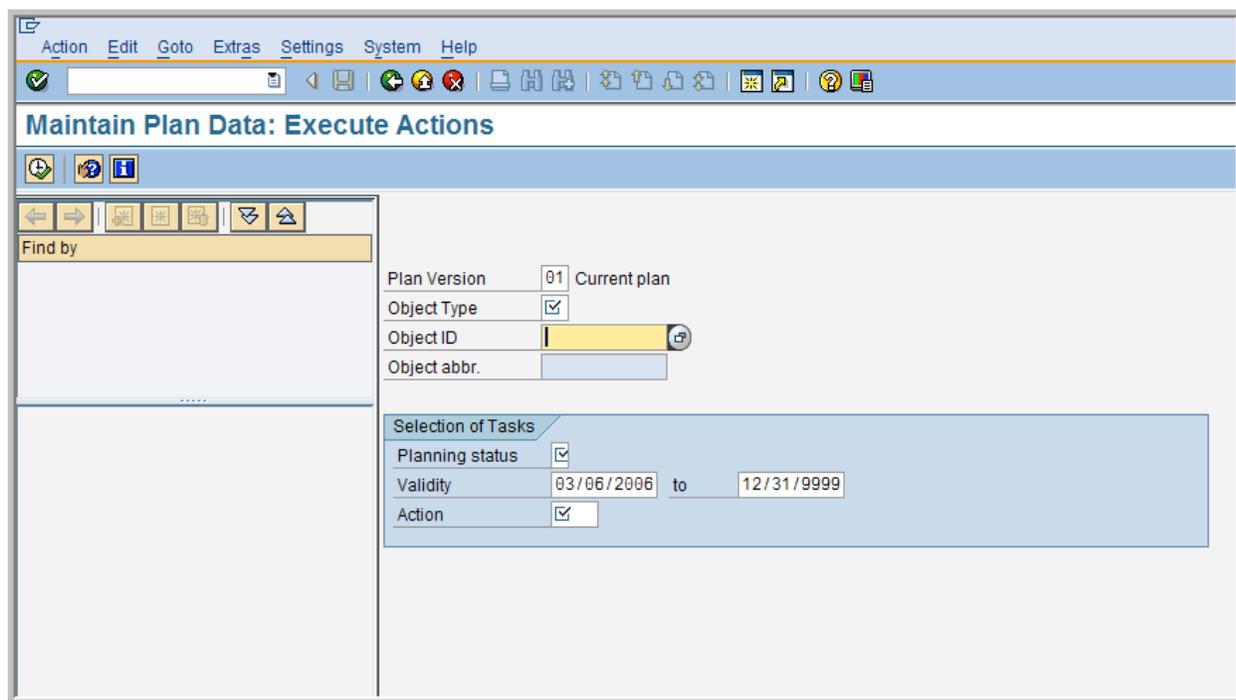
The screenshot displays the SAP 'Maintain object' transaction interface. The window title is 'Object Edit Goto Utilities(M) Settings System Help'. The main title bar reads 'Maintain object'. Below this, there are several toolbars with icons for navigation and editing. On the left, a 'Find by' panel is visible with options for 'Organizational unit', 'Search Term', and 'Structure Search'. The main area contains a form with the following fields:

- Plan Version: p1 Current plan
- Object Type: O Organizational unit
- Object ID: 50000834
- Object abbr.: Provost

Below the form, there are tabs for 'Active', 'Planned', 'Submitted', 'Approved', and 'Rejected'. The 'Active' tab is selected. A table with columns 'Infotype Name', 'Object', 'Relationships', and 'Description' is shown. The 'Object' and 'Relationships' rows have checkmarks in the 'Object' column. To the right of the table is a 'Time period' section with a radio button for 'Period' and a date range from '03/06/2006' to '12/31/9999'. Other options include 'Today', 'All', 'From curr.date', 'To current date', 'Current week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Select' button is located at the bottom of the time period section.

Transaction Code PP03 - Maintain Plan Data - Execute Action

This transaction code, through the use of a dynamic action, presents the user with all screens needed to maintain the selected object. This transaction code will be used most frequently at Purdue.



The screenshot displays the 'Maintain Plan Data: Execute Actions' window. The interface includes a menu bar with 'Action', 'Edit', 'Goto', 'Extras', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is divided into several sections:

- Find by:** A search area on the left side.
- Plan Version:** A text box containing '01' with the label 'Current plan'.
- Object Type:** A checkbox that is checked.
- Object ID:** A text box that is empty.
- Object abbr.:** A text box that is empty.
- Selection of Tasks:** A section containing:
 - Planning status:** A checked checkbox.
 - Validity:** A date range from '03/06/2006' to '12/31/9999'.
 - Action:** A checked checkbox.

Position Code Decode

TBD

Organizational Management Roles

The following roles have been established for Organizational Management transactions.

OM Processor

The OM Processor role provides capabilities to create, display, change, or delete data related to Organizational Management objects of Jobs and Positions. This role also allows limited reporting capability. The OM Processor role will be held by staff in the Compensation and Classification division of Human Resource Services.

HR Compensation Analyst

The HR Compensation Analyst role provides capabilities to create, display, change, or delete data related to Organizational Management objects of Jobs and Positions. This role also allows for more enhanced reporting capability. The HR Compensation Analyst role will be held by staff in the Compensation and Classification division of Human Resource Services.

HR Organizational Structure Analyst

The HR Organizational Structure Analyst role provides capabilities to create, display, change, or delete data related to Organizational Units. This role also allows for enhanced reporting capability. The HR Organizational Structure Analyst role will be held by staff in Human Resources. This role also provides capabilities for configuration of Organizational Management objects in the new system.