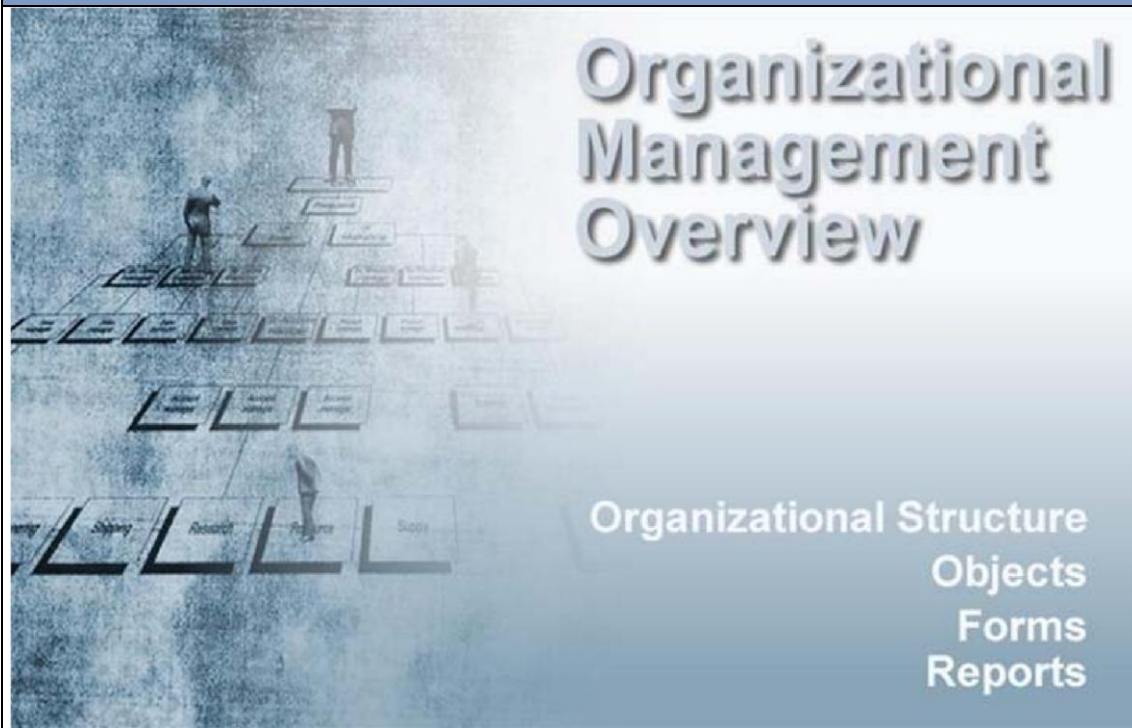


Organizational Management Overview

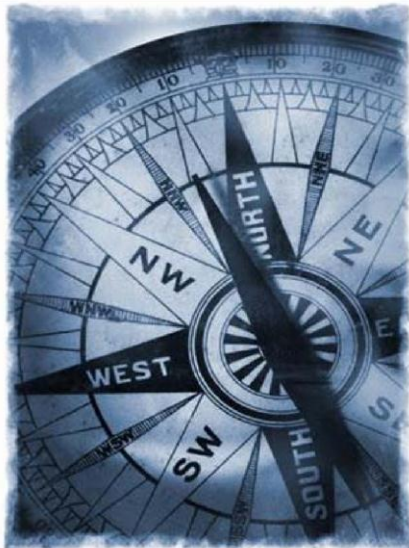
HCM - Organizational Management Overview



Organizational Management Overview



Course Objectives



By the end of this course, you should be able to:

- Identify Organizational Management (OM) processes
- Display OM data and reports
- Recognize key terms and concepts

Common SAP Terminology

Object - Building-blocks used to define the organizational management structure in SAP. There are five objects: Organizational Unit, Job, Position, Person, and Cost Center.

Organization Unit (O) - The object for creating the organizational structure. Organizational units describe bureaus and business units within those bureaus.

Job (C) - A classified assignment as designated by the Bureau of Human Resources.

Position (S) - Occupied by an individual employee (person), bears relationship to a job and an organizational unit.

Person/Holder (P) - Employee at the City of Portland.

Cost Center (K) - Identifies where in the finance structure a cost should be posted. These 'charge codes' tie the finance (FILO) side of SAP to the human resources (HCM) side.

Chief Positions - Represents the supervisor or manager of the positions within the organizational unit.

Objects



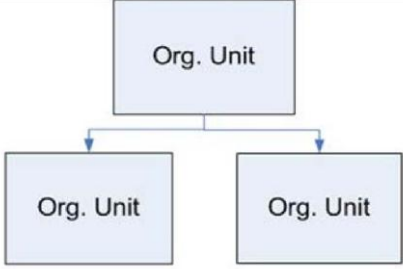
Objects are the basic components used to describe the organization

- Organizational Unit (O)
- Job (C)
- Position (S)
- Person (P)
- Cost Center(K)

Each object is unique and contains specific characteristics and tasks.

Subordinate objects inherit characteristics from superior objects and link together to form the

Organizational Units (O)

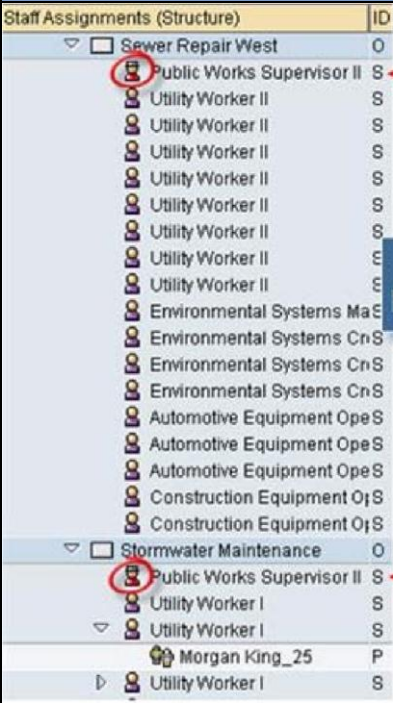


The diagram shows a hierarchical structure of organizational units. At the top is a box labeled 'Org. Unit'. Two arrows point downwards from this box to two separate boxes, each also labeled 'Org. Unit', representing a parent-child relationship.

- Describe the different City business areas (bureaus and divisions within bureaus)
- Created and linked to one another to form the hierarchical structure
- Provide the structure to which positions are linked
- Include one or more jobs and positions

Organizational unit

Chief Positions



The screenshot shows a list of staff assignments in a hierarchical tree view. Two 'Public Works Supervisor II' positions are circled in red. A blue box labeled 'Chief Positions' has red arrows pointing to these two circled positions. The list includes various roles like 'Utility Worker II', 'Environmental Systems Maintenance', and 'Automotive Equipment Operator'.

- Only one chief position for each organizational unit
- A position cannot serve as the chief of more than one organizational unit
- Is assigned to an organizational unit

Jobs (C)

```

    graph TD
      OU1[Org. Unit] --> OU2[Org. Unit]
      OU1 --> OU3[Org. Unit]
      OU2 --> J1[Job 1]
      OU2 --> J2[Job 2]
      OU3 --> J3[Job 3]
    
```

- General classifications of tasks performed by employees
- Multiple organizational units can use multiple Job classifications simultaneously
- Describe positions, though they may be related to multiple positions
- Are created and updated by BHR Classification/Compensation

Job

Positions (S)

```

    graph TD
      OU1[Org. Unit] --> OU2[Org. Unit]
      OU1 --> OU3[Org. Unit]
      OU2 --> J1[Job 1]
      J1 --> P{Position}
      OU2 --> P
    
```

Positions:

Have a relationship to an organizational unit and to a job.

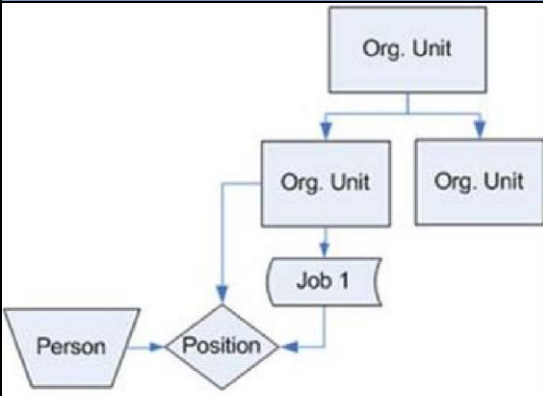
Inherit characteristics from:

- Job - including planned compensation
- Organizational Unit (unless they are overridden at the position level) - including cost center

Are held by persons

Position

Persons (P)



Employees are linked to the organizational structure based upon their assignment to a position.

Persons fill the position.

If you remove the Person, the Position, Job, and Organizational Unit still exist.

Persons are what integrate Organizational Management with Personnel Administration

Person

Master Cost Center

Account Assignment	ID	Relationship text
Environmental & Operational Systems	O 20000392	
Environmental Systems Division/One Call	K TRMN000016	Cost center assignment
Public Works Division Manager	S 40004279	Incorporates
Utility Worker II	S 40001479	Incorporates
Adm Ast - FTRG	S 40000932	Incorporates
Adm Ast - FTRG	S 40000933	Incorporates
Adm Ast - FTRG	S 40000934	Incorporates
Adm Ast - FTRG	S 40000935	Incorporates
Adm Ast - FTRG	S 40000936	Incorporates
Adm Ast - FTRG	S 40000937	Incorporates
Administrative Assistant	S 40003871	Incorporates

Maintained as a relationship on the Organizational Unit and the Position

Serves as home cost center for budgeting and default if position cost distribution is missing

Cost Distribution


Account Assignment	ID	Relationship text
Environmental & Operational Systems	O 20000392	
Environmental Systems Division/One Call	K TRMN000016	Cost center assignment
Public Works Division Manager	S 40004279	Incorporates
Environmental & Operational Systems	K TRMN000015	Cost distribution
Utility Worker II	S 40001479	Incorporates
Environmental & Operational Systems	K TRMN000015	Cost distribution
Adm Ast - FTRG	S 40000932	Incorporates
Environmental Systems Division/One Cs	K TRMN000016	Cost distribution
Adm Ast - FTRG	S 40000933	Incorporates
Adm Ast - FTRG	S 40000934	Incorporates
Adm Ast - FTRG	S 40000935	Incorporates

Overrides master cost center

Maintained on the position only

Allows position costs to be split between multiple cost objects

Object Infotypes



Object characteristics are individually stored and saved on each object as “Infotypes.” An infotype is a screen in SAP that groups similar data together.

Objects contain multiple infotypes, including:

- An object infotype that defines and describes the object
- A relationship infotype that defines how it is related to other objects
- One or more additional infotypes to describe the characteristics unique to the object

Display OM Data and Reports - Objectives

Section Objectives

By the end of this section, you should be able to:

- Identify Bureau of Human Resources forms to use
- Display OM data and reports

Forms for Requesting OM Changes



The characteristics that default from the position do not always coincide with personnel business scenarios. Thus, objects need to be altered prior to the Personnel Administrator executing an actions

There are 2 forms needed to initiate the Organizational Management changes your bureau requires:

- Organizational Unit & Position Maintenance Form
- BHR Personnel Action Request form (SUPERFORM)

BHR Forms Website - <http://www.portlandoregon.gov/bhr/27728>

Display OM Data and Reports – Transactions and Work Instructions

For a comprehensive list of work instructions for all the OM transactions, visit the SAP Learning Center / Organizational Management Module website: <http://www.portlandoregon.gov/cao/62667>

Below is a list of specific transactions which may be helpful in your role.

Display Organization and Staffing -PPOSE to view the City's organizational structure

<http://www.portlandoregon.gov/cao/article/461436>

Display Organizational Unit - PO10D to view organizational unit infotype details

<http://www.portlandoregon.gov/cao/article/461434>

Display Position - PO13D to view position infotype details

<http://www.portlandoregon.gov/cao/article/461435>