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Lesson Objectives

After completing this lesson, participants will be able to understand about

- Object Types
- Object Relationships
- Evaluation paths
- Organization planning
- Time constraints
- Organizational structure interfaces
 - Organization and staffing
 - Expert mode
 - Simple maintenance
- OM infotypes
- General structures
 - Evaluation paths for general structures
 - Evaluation paths - maintenance
- Integrations in OM
 - Integration between OM and PA
 - Integration settings
 - Integration tools

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Introduction to OM

- Organizational management (OM) is one of the important sub-module of SAP HR that helps in personnel planning and application development.
- Organizational management enables in analyzing the entire organizational structure and allows planning to develop personnel scenarios.
- Organizational management provides a basis for implementing or using other Human Resources components and cross-application components (such as Workflow).
- Organizational management is based on object-oriented design, that is, each element in an organization represents a standalone object with individual characteristics.
- These objects are created and maintained individually. They are then linked together by using relationships

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Basic OM Object Types

An organizational plan consists of many object types. The object types shown in the below figure form the building blocks. Each object type has a key associated with it.

Object Type	Object Type Key	Object Icon
Organizational unit	O	
Job	C	
Position	S	
Cost center	K	
Person	P	

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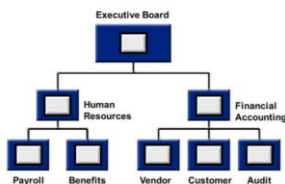
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Basic OM Object Types

Organizational Unit

- Object type **O** is used for Organizational Unit.
- Organizational units represent various units of company.
- These units can be departments, groups or project teams, for example.
- Organizational structure of a company can be set by creating relationships between the multiple organizational units.



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Basic OM Object Types

Position

- Object type **S** is used for Position.
- Positions represent concrete and specific job roles that are held by persons within the company. Positions are company-specific.
- A position is usually occupied by one person. However, a position can have multiple assignments.
- Positions are assigned to organizational units and can inherit characteristics from a job.



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Basic OM Object Types

Job

- Object type **C** is used for Job.
- Jobs are general classifications for sets of functions.
- A job describes a position. Through this relationship, the position automatically inherits the tasks, qualifications, and characteristics assigned to the job.
- Jobs are important in the following components:
 - Shift Planning
 - Personnel Cost Planning
 - Career and Succession Planning
 - Compensation Management



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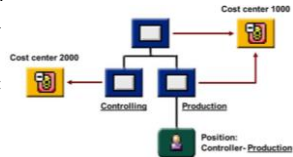
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Basic OM Object Types

Cost Center

- Object type **K** is used for Cost Center.
- Cost centers are a Controlling/Finance item that represents the origin of costs.
- Cost center are external from OM and will be created and maintained in the Controlling (CO) module.
- Cost centers can be related to either organizational units or positions.
- The relationship between organizational units and cost centers is hierarchically inherited along with the structure.



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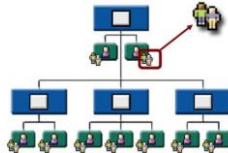
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Basic OM Object Types

Person

- Object type **P** is used for Person.
- Persons generally represent employees within an organizational unit and hold positions within the organizational structure.
- Additional information for employees such as organizational assignment, planned working time, basic pay, and addresses are maintained in infotypes in PA.



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Other OM Object Types

Task

- Object type **T** is used for Task.
- Tasks describe the responsibilities of organizational units, jobs, positions, persons, and work centers.
- To link tasks to a set of positions, you must first link the task common to all positions to the corresponding job. In this way, when you create a position based on the job, the tasks are automatically transferred to the position.



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Other OM Object Types

Work Center

- Object type **A** is used for Work Center.
- Work centers represent the physical locations where tasks are carried out.
- Several positions can share one work center. For example, the Reception work center can be assigned to two positions that are held by persons who work different shifts



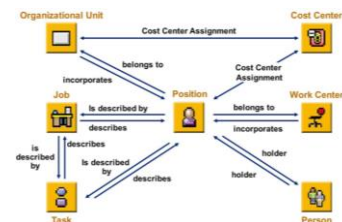
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Object Relationships

Objects are linked to each other using relationships.



Different types of relationships are used because there are different types of connections between elements.

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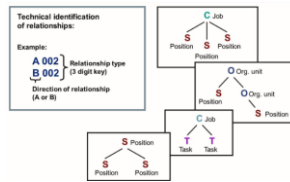
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Object Relationships

Relationship ID

- Standard relationship has a 3-digit numeric key.
- The namespace AAA to ZZZ is reserved for customer-specific one.
- Relationships between objects are reciprocal. If a job describes a position, then the position, in turn, is described by the job.



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Object Relationships

Relationship ID

- The direction of these relationships is distinguished by using the identifiers A or B in the relationship name.
- Relationship should be created only for one direction. The inverse relationship is created automatically by the system.
- A relationship can also be one sided, in that it exists in only one direction. Relationships to an external object type (for example, a cost center) are often one sided.

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Object Relationships

Organizational Unit

- By creating relationships between organizational units, we create an organizational structure.
- An organizational unit can have many subordinate organizational units, but only one higher-level organizational unit.

The following table shows some examples of standard relationships between organizational units

Relationship	Description
A 002	An organizational unit <i>reports to</i> another organizational unit.
B 002	An organizational unit is <i>line supervisor of</i> another organizational unit.

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Object Relationships

Organizational Unit and Position

- Positions are linked to organizational units in the organizational plan.
- A/B003 is also used to map organizational units and positions.

The following table shows the relationships between a position and an organizational unit

Relationship	Description
A 003	A position <i>belongs to</i> an organizational unit.
B 003	An organizational unit <i>incorporates</i> a position.

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Object Relationships

Jobs and Position

- When a position is created based on a job, it inherits the characteristics of the job.
- Jobs can describe many positions; however, a position can be described by only one job.

The following table shows the relationships between a job and a position

Relationship	Description
A 007	A job <i>describes</i> a position.
B 007	A position is <i>described by</i> a job.

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Object Relationships

Position and Person

- The position is the object that links persons or users to the organizational plan.
- A position can be held by more than one person or user and a person can hold more than one position. However, a one-to-one ratio is the ideal scenario.

The following table shows the standard relationship between a person and a position

Relationship	Description
A 008	A person is assigned as the holder of a position.
B 008	A person is the holder of a position.

Other relationships between persons and positions are as follows:

- A/B009: Successor
- A/B010: Substitute

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Object Relationships

Cost Centers

- An organizational unit or a position is assigned to a cost center by using relationship A 011.

Chief Position

- A position which will be designated as the chief must first belong to the organizational unit with the 003 relationship.

The table shows the relationships that exist when a position manages an organizational unit in a standard system

Relationship	Description
A 012	A position <i>manages</i> an organizational unit.
B 012	An organizational unit <i>is managed by</i> a position.

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Object Relationships

Positions

- The relationships between positions form the reporting hierarchy that can be evaluated independently of the organizational structure.

The table shows the relationships between positions

Relationship	Description
A 002	A position reports to another position. Example: The position Payroll Administrator position reports to the position Payroll Manager.
B 002	A position is line supervisor of another position. Example: The Payroll Manager position is the line supervisor of the Payroll Specialist positions.
A/B 004	is subordinate to (disc.) / is disc. supervisor of
A/B 210	Substitutes with Profile

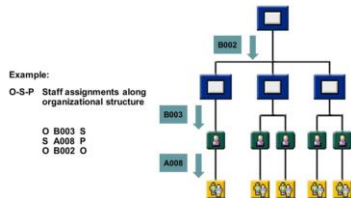
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Evaluation Paths

- An evaluation path represents a chain of relationships between particular object types in an organizational structure.
- Evaluation paths define how a structure is created. It is not always possible for all of them to be included in a single view, because objects can have multiple relationships.



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Number Ranges

A Number range is a Group of numbers to which the unique object Id value is created.

Types of Number Ranges

- Internal number range:** System generates the number (within the range you've specified) next to the immediate previous allotted number.
- External number range:** This is where the person creating the SAP object is required to enter his choice of number. This will be as per the alpha-numeric pattern he has already declared while creating the number range.

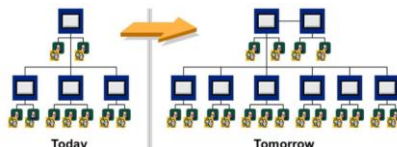
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Organization Planning

- OM enables you to depict your company in the past, present, and future using the following information
 - Validity periods
 - Plan versions
 - Plan statuses
- The figure shows the existing organizational structure of an enterprise on the left. Using OM, you can plan any type of enterprise restructuring or reorganization and then reproduce the structure in the system.



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Organization Planning

Plan Version

- Plan versions allows to depict and manage several organizational plans in the system at the same time. However, only one plan version can be integrated.
- This plan version represents the valid organizational plan, and is flagged as the active or integrated plan version. You must define the active plan version when you integrate the SAP system.
- Once you designate a plan version such as 01 as the active plan version, as a rule it should always be 01

P	Plan version	Active	Current
00	Never use	<input type="checkbox"/>	<input type="checkbox"/>
00	Template	<input type="checkbox"/>	<input type="checkbox"/>
01	Current plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AS	Acquisition scenario	<input type="checkbox"/>	<input type="checkbox"/>
DS	Downsizing scenario	<input type="checkbox"/>	<input type="checkbox"/>
25	Plan version 25	<input type="checkbox"/>	<input type="checkbox"/>
PT	Fiscal year-end closing scenario	<input type="checkbox"/>	<input type="checkbox"/>
TP	Performance-based maintenance plan	<input type="checkbox"/>	<input type="checkbox"/>

PL0GI PL0GI 01 Integration Plan Version / Active Plan Version

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Organization Planning

Plan Status

A plan status is assigned to each infotype record. An infotype record can be assigned any one of the following statuses:

- **Planned status:** The planned status indicates that an infotype record (that is operable) is proposed, but not currently active.
- **Submitted status:** The submitted status indicates that an infotype record has been submitted for review and subsequent approval or rejection by a person or group of persons.
- **Approved status:** The approved status indicates that an infotype record (that was previously submitted for review) has been accepted or approved.
- **Rejected status:** The rejected status indicates that an infotype record (that was previously submitted for review) has been rejected.
- **Active status:** The active status indicates that an infotype record is currently operable.



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Organization Planning

Plan Status

- Objects can be created in either planned or active status.
- Many companies only use the active status.
- Plan statuses are primarily intended for use with the approval procedure in workflow.
- The report RHAKT100 allows to change the status of several objects at the same time.

Object Characteristics

- Object characteristics are maintained in infotypes.
- The *Object (IT1000)* and *Relationships (IT1001)* infotypes are the two most important infotypes. These infotypes are referred to as the main properties or main characteristics.
- The *Object infotype* includes the ID number, short and long text, validity period, and plan status. This infotype is used to define the existence of the object.

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Organization Planning

Object Characteristics

- The Relationships infotype links the objects with other objects. This infotype provides the individual objects with their relevance in the system.
- The other infotypes enable to define particular business characteristics for an object.
- Some infotypes can be maintained for all object types, for example the Object and Relationships infotypes.
- Others infotypes are only relevant for particular object types. For example, the Vacancy infotype is relevant only for positions and the Character infotype is relevant only for tasks.
- Not all infotypes are absolutely necessary. However, they can provide important information about objects.

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Organization Planning

Validity Data

- Each infotype record uses a start date and an end date to specify the validity period for the infotype data. You must assign a validity period to every infotype record you create.

The key characteristics of a validity period are as follows

- It allows you to define the life span of an infotype record.
- It identifies changes to your organization while retaining historical data.
- It allows you to evaluate the organizational structure on key dates.
- The validity of an object's relationships and attributes can exist only within the life span of the object defined in the Object infotype.
- If an object is delimited, all the object's relationships and characteristics are also automatically delimited.
- A relationship is valid only if both objects are valid.

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Organization Planning

Time Constraint

- Time constraints are used internally by the system to guarantee the integrity of data.
- You use time constraints to control system reactions according to company-specific requirements.
- For example, if you want to let positions report to a number of supervisors, you can set up a time constraint to allow several relationships to exist.

Examples of the time constraints that can be implemented are as follows:

Time constraint 1: For Infotypes falling under Time Constraint 1, it is mandatory for a record to exist, and only 1 can exist at any point in time. For example, Infotype 0002 (personal data).

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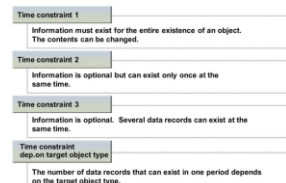
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Organization Planning

Time Constraint

Time constraint 2: For Infotypes falling under time constraint 2, it is NOT mandatory for a record to exist, but only 1 can exist at any point in time. For example, Infotype 0218 (membership insurance)

Time constraint 3: For Infotypes falling under Time Constraint 3, it is NOT mandatory for a record to exist, but many can exist. For example, SAP Infotype 0015 (additional payments).



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Organizational Structure Interfaces

There are multiple interfaces provided by SAP to build an organizational structure.

1. Organization and Staffing
2. Expert Mode
3. Simple Maintenance

Organization and Staffing

Using this method, the organization objects can be moved using the drag-and-drop approach. Also, we can add some extra attributes to the organizational objects.

Navigation Path: *SAP Easy Access* → *Organizational Management* → *Organizational Plan* → *Organization and Staffing* → *PPOCE - Create*

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Organizational Structure Interfaces

Expert Mode

Using this method, we can maintain any type of attribute to any of the organizational objects.

Navigation Path: *SAP Easy Access* → *SAP Menu* → *Organizational Management* → *Expert Mode* → *PP01 - General*

Simple Maintenance

The Simple Maintenance method, an older method of maintaining an organizational structure, is used to build an organizational structure and assign Cost Center in an easy way on one screen itself.

Navigation Path: *SAP Menu* → *Human Resources* → *Organizational Management* → *Expert Mode* → *Simple Maintenance* → *PPOC_OLD - Create*

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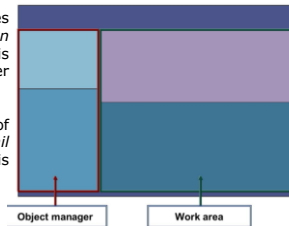
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Organization and Staffing Interface

The Organization and Staffing user interface is divided into the following main areas:

- o Object manager
- o Work area
- The **object manager** comprises a **search area** and a **selection area**. The object manager is available in numerous HR user interfaces.
- The **work area** is composed of an **overview area** and a **detail area**. Each of these areas is further subdivided.



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Organization and Staffing

The table describes the various areas of the Organization and Staffing interface:

Area	Description
Search Area	In the search area, you can use the search function to locate objects such as organizational units, persons, jobs, positions, tasks and users.
Selection Area	In the selection area, you can select an object that was obtained through a search, and use it in the overview or detail areas.
Overview Area	In the overview area, you can process selected objects in your organizational environment. Different evaluation paths are available here depending on the object type.
Detail Area	In the detail area, you can maintain detailed characteristics for the object that you have double-clicked in the overview area.



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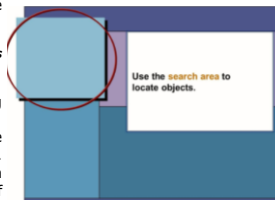
Organization and Staffing

Search Area

You can use the search tools in the search area to locate the objects you want to display.

Characteristics of search functions include the following:

- o The objects you are searching for must exist.
- o Some search functions are specific to the object type. When searching with a search term, enter the name or part of the name of the object you are looking for (you can use an asterisk (*) as a wild card).



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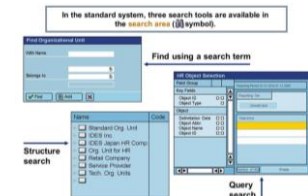
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Organization and Staffing

Search Area

- o You can restrict the number of hits, if required, by entering whether an object is directly or indirectly assigned to another object.
- o The free search uses the Ad Hoc Query.
- o When you search according to the structure, the entire structure is displayed in the selection area. You can select the object you wish to work with from the selection area.



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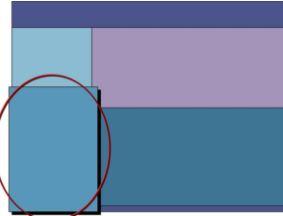
Organization and Staffing

Selection Area

The objects obtained by the search are listed in the selection area.

To select an object, you can use one of the following methods:

- Double-click the object. It is displayed with a standard evaluation path in the overview area.
- Right-click on a specific evaluation path to access the object directly in the overview area.
- Select one or more objects and assign them to another object in the overview area by drag and drop. The selected object is displayed in the detail area for further processing.



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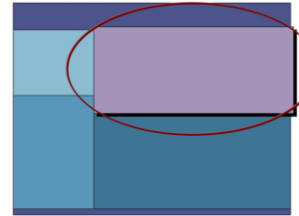
Organization and Staffing

Overview Area

- The selected object is displayed in the overview area as a list or a tree structure.
- You can double-click the object in the overview area to display the object characteristics in the detail area.

You can display the following objects in the overview area:

- An organizational unit and its organizational structure
- The person in the staff assignment of an organizational unit
- The task assignment that shows the organizational units, positions, jobs, and persons related to the tasks



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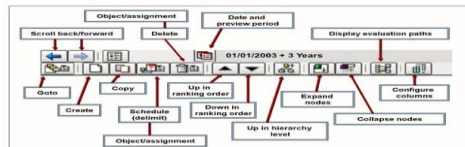
Organization and Staffing

Detail Area

- In the detail area, object characteristics can be maintained from the overview area.
- When you double-click an object from the overview area to select it, the properties of the object are displayed on the tab pages in the detail area.



Icons on the Organization and Staffing User Interface



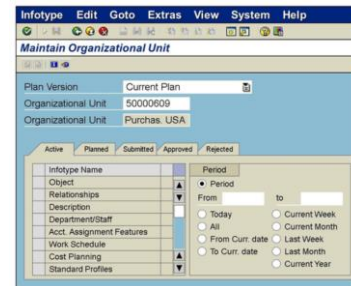
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Expert Mode

You can access infotypes directly from object maintenance. As part of object maintenance, you can maintain infotype records with different statuses.



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Expert Mode

The following table shows the fields used to maintain infotypes and their description:

Field	Description
Plan Version	Ensures that you are working on the correct plan version at all times
Object ID	Displays the object ID and enables you to find the object you want to maintain
Abbreviation	Displays the abbreviation to ensure that the right object is being edited
Validity Period	Specifies the start and end dates of the period during which the object exists in the current plan version
Infotype	Helps you select the infotype you want to maintain
Status	Allows you to select the infotypes you want to maintain by using the status tab pages
Display Available Infotypes	Shows the infotype records that exist for the object selected (indicated by a green checkmark) depending on the period

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Expert Mode

Maintain Infotypes

Functions

The following table describes functions of the various icons:

Icon	Function
Create	Creates an infotype record
Copy	Copies data from an existing record
Change	Corrects or changes data for an infotype record
Delete	Deletes an infotype record
Display	Displays a single infotype record
Delimit	Delimits an infotype record
Overview	Displays all records for an infotypes
Activate	Changes the status of an Infotype to Active

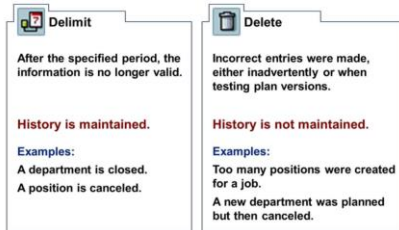
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Expert Mode

Maintain Infotypes

Delimitation and Deletion

When you delete or delimit an object, all of its infotypes are also deleted or delimited.

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Expert Mode

OM Infotypes

Object

The *Object infotype (IT1000)* is a special infotype. Infotypes usually describe an object's characteristics.

The *Object infotype* has the following functions:

- o It allows you to create new objects, for example, organizational units, jobs, and positions.
- o It determines the lifecycle of all other infotypes created for the object.
- o It defines the existence of an organizational object.

To create new objects, you must maintain the following data:

- o Validity period of the object
- o Status
- o Object abbreviation (12 characters)
- o Name (40 characters)

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Expert Mode

OM Infotypes

Relationships

- The *Relationships infotype (IT1001)* enables you to define relationships between various objects.
- You create relationship records manually when you work in infotype maintenance.
- However, the system creates certain relationships automatically for the Organization and Staffing, Simple Maintenance, and General Structure interfaces.
- There are many different relationship types that you can create between object types.
- Each individual relationship represents a subtype of the Relationships infotype.
- When you create a relationship, the inverse relationship is usually created by the system.

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Expert Mode

OM Infotypes

Description

- The *Description infotype (IT1002)* enables you to enter long text descriptions for objects.
- The infotype subtype specifies various types of descriptions. For example, you may want to explain an organizational unit's purpose or responsibilities.

Report RHTRANS0 enables you to obtain a list of language-dependent infotypes in Organizational Management (OM), and translate them into different languages.

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Expert Mode

OM Infotypes

Department or Staff

The *Department or Staff infotype (IT1003)* is used for organizational units and positions only.

The *Department or Staff infotype* has the following functions:

- **The staff indicator (possible for positions and organizational units)** - The staff indicator shows that an organizational unit or a position is not part of the reporting structure of a company, but reports directly to an organizational unit within the structure of the company. For example, the Human Resources department is not part of the company's reporting structure. It reports directly to the Executive Board as a staff department.
- **The department indicator (only relevant for organizational units)** - It can be necessary to flag an organizational unit as a department when integration between OM and Personnel Administration (PA) is active. If you need to define organizational units in more detail (for example, at team level) in OM than is necessary in PA, you have to use the department indicator.

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Expert Mode

OM Infotypes

Department or Staff

- The *Department or Staff infotype* allows you to specify the organizational unit entered for the employee in the Organizational Assignment (IT0001) infotype.
- After the infotype is activated in Customizing, the system reads the organizational structure.
- It starts reading from the relevant employee, until it finds an organizational unit flagged with the department indicator.

If you want to use the department indicator, you must set the switch PPABT PPABT in table T77S0 to 1.

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Expert Mode



OM Infotypes

Vacancy

- The *Vacancy infotype (IT1007)* can be created for a position that is occupied or unoccupied.
- You can flag an occupied position as vacant if you know that the position holder will be leaving the position at some point in the future (as a result of a promotion or transfer, for example).
- Positions cannot be flagged simultaneously as vacant and obsolete. If a vacant position is flagged as obsolete, then the vacancy is delimited at the start of the validity of the obsolete indicator (minus one day).
- It is not mandatory to maintain the Vacancy infotype.
- If your company does not distinguish between occupied and unoccupied positions (that is, you consider all unoccupied positions to be vacant) then you can make the necessary settings in Customizing.

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Expert Mode



OM Infotypes

Obsolete

- The *Obsolete infotype (IT1014)* is used to flag positions that are no longer needed (for example, due to reorganization), but are still occupied.
- As soon as the position holder leaves the position (for example, due to a transfer), a dialog box automatically appears in which you can delimit the position.
- Positions flagged as obsolete cannot be set to vacant.
- In Customizing for the Holder relationship (A or B008), you specify whether the Obsolete infotype is to be used and how the system reacts (error, warning, or information message) if the user attempts to assign a person to an obsolete position.

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Expert Mode



OM Infotypes

Account Assignment Features

- The *Account Assignment Features infotype (IT1008)* can be created for organizational units and positions.
- If integration with PA is active, the Account Assignment Features infotype provides default values for the classification of employees in the enterprise structure of the company.
- These values may be personnel areas, personnel subareas, or business areas. If the data entered differs from the default values, the system displays a warning message.
- Subordinate organizational units and positions inherit the Account Assignment Features infotype.
- A personnel area and cost center must belong to the same company code before an employee can be assigned both.

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Expert Mode



OM Infotypes

Work Schedule

- The *Work Schedule infotype (IT1011)* enables you to define a work schedule, such as the average number of hours to be worked, for organizational units, work centers, or positions.
- In Customizing, you can create a standard working time (hours per day, per week, per month, or per year) that is valid company-wide.
- The working times stored in OM are needed for comparison with the values stored for the person in the Planned Working Time infotype (IT0007).
- You can activate and configure this comparison in Customizing for the relationship attributes of the Holder Relationship (A/B008).

Report *RHSBES10* compares the working time stored in the Work Schedule infotype (IT1011) with the working times that are actually stored for the person in the Planned Working Time infotype (IT0007).

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Expert Mode



OM Infotypes

Employee Group/Subgroup

- The *Employee Group/Subgroup infotype (IT1013)* enables you to assign a position to an employee group and subgroup.
- When a position is occupied by an employee, the system proposes an employee group and employee subgroup, if integration with PA is active.
- If you enter a different employee group or subgroup, a warning message is displayed. Users can overwrite these values at any time.
- Assigning a position to an employee group or subgroup also allows the system to determine the work schedule group in OM and thereby determine the relevant working time (IT1011) for the position.
- Employee groups and subgroups feature frequently in PA and Payroll.

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Expert Mode



OM Infotypes

Cost Distribution

- The *Cost Distribution (IT1018)* infotype allows organizational units and positions to be assigned to both the master cost center and additional cost centers, orders, or WBS elements.
- You must enter a cost unit and a percentage for cost distribution. The percentage assignment to the master cost center is based on the difference (up to 100%).
- An employee inherits the cost distribution assigned to his or her position or organizational unit.
- Payroll can also use the Cost Distribution infotype in OM.
- However, if integration between OM and PA is active, and the employee has an active PA Cost Distribution infotype (IT0027), the PA infotype will take precedence.

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Expert Mode

Default Values for OM Infotypes

- When you enter the details of a new employee in the HR master data, you can enter the position in the Actions infotype.
- Based on the position you enter, the values stored in OM appear in the fields in the Actions infotype (IT0000).
- When you assign a value for the personnel area of a position at organizational unit level, the same value is set as the default value for the position in the hierarchy of the organizational unit.

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Expert Mode

Default Values for OM Infotypes

- The default values for the employee group and subgroup are based on the Employee Group/Subgroup infotype.
- Default values can also appear in the Organizational Assignment infotype.
- All values in the organizational plan area, except the organizational key, are determined directly through the assigned position and transferred to the infotype.
- The same also applies to the assigned cost center. The cost center originates either from the relationship of the organizational unit or position, or from the inheritance logic in OM for cost centers.

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Expert Mode

OM Actions

- You can create objects by using actions.
- An action is a series of infotypes presented for editing in a specific order or sequence.
- You can determine the sequence in Customizing.

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Expert Mode

OM Actions

For example, the standard action, create a position, consists of the following infotypes:

- Object
- Relationship to Organizational Unit
- Relationship to Describing Job
- Description
- Department or Staff

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Simple Maintenance Interface

- The Simple Maintenance interface enables users to create the organizational plan and to maintain large volumes of data easily.
- This interface requires considerably less system resources than the more modern Organization and Staffing user interface.
- Although Simple Maintenance is available to all users of OM, it was originally designed to meet the needs of SAP Business Workflow users.
- To edit the individual organizational objects in more detail, you can use the Organization and Staffing and Expert Mode (Infotype Maintenance) interfaces.

On the Simple Maintenance user interface, three main evaluation paths are used. Each evaluation path includes certain maintenance functions, depending on whether you want to maintain *organizational structures*, *staff assignments*, or *task profiles*.

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Simple Maintenance Interface

The evaluation paths offer you the following basic structures:

Change Organizational Structure

- The Change Organizational Structure evaluation path is the initial screen in Simple Maintenance.
- From here, you can switch to the other screens in Simple Maintenance.
- The Change Organizational Structure view allows you to create and maintain the organizational structure.

Change Staff Assignments

- The Change Staff Assignments evaluation path allows you to edit the staff assignments required for an organizational plan.
- When you create positions in the Change Staff Assignments view, you automatically create the relationships that link positions with organizational units.

Change Task Profile

- The Change Task Profile evaluation path allows you to create, maintain, and display task profiles for organizational units, jobs, positions, and users.

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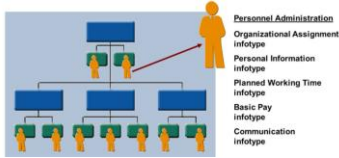
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Integration in Organizational Management

Integration Between OM and PA

Personnel Administration (PA)

- Persons are objects that hold positions in an organizational structure. PA maintains person related data.
- The integration of PA with OM enables you to automate some of the maintenance tasks.



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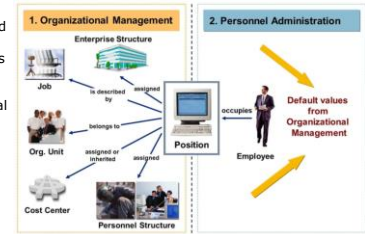
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Integration in Organizational Management

Integration Between OM and PA

Organizational Assignment

- If integration is active and a person is assigned to a position in HR master data, the objects linked with the position in HR master data are written to Organizational Assignment Infotype.
- If integration is active, the Organizational Unit, Job, and Cost Center fields are not ready for input, but are filled in the Organizational Management infotype (IT0001) exclusively from OM.



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Integration in Organizational Management

Integration Between OM and PA

- In addition, every organizational change is stored in both the Organizational Assignment infotype in HR master data and the organizational plan in OM.
- This means that if a change made in OM affects the organizational assignment of a person, then the change in the HR master data is written to the Organizational Assignment infotype.
- Similarly, a change made to a person's organizational assignment (for example, as a result of a personnel action) in HR master data is updated in OM.

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Integration in Organizational Management

Basic Integration Settings

- The **PLOGI** feature is used to decide the employees that are taken into account for integration between OM and PA.
- You must first set the integration Plan Version in the **PLOGI** entry in table **T77S0**.
- If you do not define an integration plan version, integration is not active.

Basic settings for integration with T77S0

Group	Sem. Abbr.	Value Abbr.	Description
PLOGI	PLOGI	01	Integration Variant / Active Plan Version
PLOGI	ORGA	X	Integration Switch: Organizational Management

PLOGI Feature Which employees are taken into account for integration between Organizational Management and Personnel Administration?	TCLAS	Transaction for Data Retention
	MOLGA	Country Grouping
	BUKRS	Company Code
	WERKS	Personnel Area
	BTATL	Personnel Subarea
	PERSG	Employee Group
	PERSK	Employee Subgroup

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Integration in Organizational Management

Basic Integration Settings

- You then specify the employees that need to be involved in integration. To do this, maintain the **PLOGI** feature.

You can form groupings according to the following criteria:

- Country grouping
 - Company code
 - Personnel area
 - Personnel subarea
 - Employee group
 - Employee subgroup
- Enter X in the Value *abbr* field of table **T77S0** to activate participation in integration. If there is to be no integration, leave the field blank.
 - If you activate the **PLOGI ORGA** switch in **T77S0** by entering X, you also activate integration between the PA and Personnel Planning components as a whole.

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Integration in Organizational Management

Additional Integration Settings

Group	Sem. Abbr.	Value Abbr.	Description
PLOGI	EVENB	X	Enhanced Integration (X = On, Space = Off)
PLOGI	EVCCC	02	Master Data Action: Company Code Change
PLOGI	EVCRE	X	Generate Event for Entry T77INT
PLOGI	PRELI	99999999	Integration: Standard Setting
PLOGI	PRELU		Integration PA Update Online or Batch

Examples of integration settings for the Group **PLOGI** include the following settings:

PLOGI EVENB: If you set the **PLOGI EVENB** switch to X, you can move a person, position, or organizational unit within an organizational structure, if this change also requires a change in the company code for the affected person(s).

PLOGI PRELI: If an employee has not been assigned to a position in the integrated system, you can use the default value contained in **PLOGI PRELI**.

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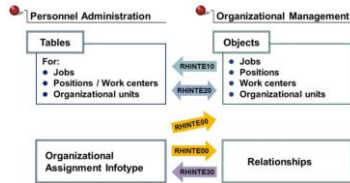
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Integration in Organizational Management

Integration Tools

The sequence in which you activate integration depends on one of the following constellations:

- You already use PA and want to implement OM. The data in PA already includes information about organizational units and positions.
- You already use OM and PA is to be integrated with OM.



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Integration in Organizational Management

Integration Tools

The following reports are used to transfer data between PA and OM.

Report RHINTE00: Reads the Organizational Assignment infotype records created in PA. It creates a batch input session that in turn creates the relevant OM objects and relationships, depending on the parameters you set.

Report RHINTE10: Generates the required table entries in PA for OM objects that are relevant for integration.

Report RHINTE20: Checks whether all of the objects relevant for integration exist in both PA and OM.

Report RHINTE30: Allows you to transfer a person's organizational assignments, such as positions and organizational units, from OM to the Organizational Assignment infotype in PA.

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Integration in Organizational Management

Integration: Default Values and Fixed Specifications

OM can support PA by providing default values.

The following table shows the default values in OM with the corresponding specifications in PA.

OM	PA
Assignment to position	Provides entries in Organizational Assignment infotype (IT0001) in organizational plan
Cost Center Assignment	Provides entry in Cost Center field in Organizational Assignment infotype (IT0001)
Cost Distribution	Is relevant for Payroll and Personnel Cost Planning
Employee Group/Subgroup	Provides the default values in Actions infotype
Planned Compensation	Delivers pay-scale information for basic pay
Work Schedule	Enables comparison of work schedule hours with the working time stored in the Planned Working Time infotype (IT0007)
Account Assignment Features	Provides the default values in Actions and Organizational Assignment infotypes

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Summary

In this lesson, you have learnt:

- Basic OM Objects and Relationships
- Evaluation paths and Time constraints
- Organization Structure Interfaces
- OM Infotypes
- Integration between PA and OM



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