

Organizational Plan Mode



HELP.BCBMTOMOM99

Release 4.6C



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Organizational Plan Mode

This section of the documentation on the *Organizational Management* component contains information on the following views:

- **Organizational and Staffing**



To access this maintenance interface, choose *Human resources → Organizational Management → Organizational Plan → Organization and Staffing* from the SAP Standard Menu. To access the *Organizational and Staffing (Workflow)* view, choose *Goto → Change view*.

- **Organizational and Staffing (Workflow)**



To access this maintenance interface from the SAP Standard Menu, choose *Tools → Business Workflow → Organizational Plan → Organization and Staffing (Workflow)*. To access the *Organizational and Staffing* view, choose *Goto → Change view*.

- **General Structures**



To access this maintenance interface, choose *Human resources → Organizational Management → Organizational Plan → General Structures* from the SAP Standard Menu.

- **Matrix**



To access this maintenance interface from the SAP Standard Menu, choose *Human Resources → Organizational Management → Organizational Plan → Matrix*.

Organizational Management

Purpose

In order to carry out numerous business and human resources processes, you need an organizational plan, that is, a functional structure representing your enterprise based on tasks.

You need to, for example:

- evaluate headcount, current division of tasks, reporting structures in your enterprise according to department (for example)



Evaluations of unoccupied positions

- allocate agents responsible for carrying out *SAP Business Workflow* tasks



Forward leave requests to agents in the personnel department

- plan possible new functional structures in Business Process (Re-) Engineering as well as your personnel requirements or personnel costs



Planning a Department Structure

- gather information for creating the task related, functional structure, in particular for other Human Resources components



Default values for personnel actions in Personnel Administration

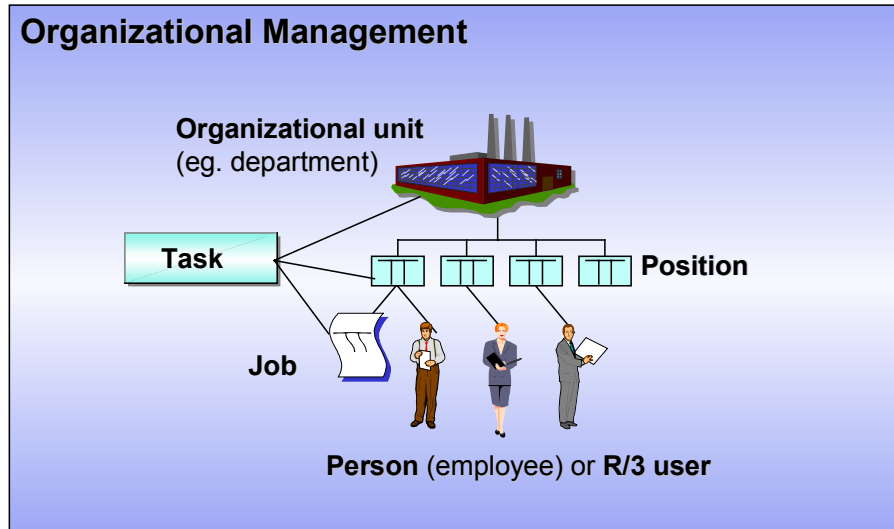
- assign structural, that is task-oriented authorizations in the R/3 System



Combination of the relevant R/3 transactions for an administrator in Purchasing

Tools from the Organizational Management component also enable you to create:

- your current valid [Organizational Plan \[Page 11\]](#) , changes to which are archived
- additional organizational plans in other [Plan Versions \[Page 31\]](#) as planning scenarios



Implementation Considerations

Organizational Management is the basis for additional Human Resources components and functions as well as for *SAP Business Workflow*. The fact that these components can be integrated should be taken into account when you are installing them.

Integration

- Installing *Organizational Management* enables you to use the following Human Resources components effectively:
 - *Personnel Development*
 - *Recruitment*
 - *Compensation Management*
 - *Personnel Cost Planning*
 - *Training and Event Management*
 - *Manager's Desktop*
- *Organizational Management* also has interfaces to the following Human Resources components:
 - *Shift Planning*
 - *Capacity Requirements Planning*

Organizational Management

- *Personnel Administration*
- *Human Resources Information System*
- *Organizational Management* also forms the basis for *SAP Business Workflow*. The organizational plan you create forms the framework for a routing structure that *SAP Business Workflow* uses to assign tasks to an employee.
 - Both *Organizational Management* and *SAP Business Workflow* are components of *Business Management*.
- Finally, *Organizational Management* can also be used with the *Controlling* component to create an enterprise organization.

Features

The *Organizational Management* component includes various **user group-specific modes and views** with which to edit organizational plans:

- The **Organizational Plan** mode includes views for **administrators** in the Personnel or organizational department:
 - The *Organization and Staffing* view provides an intuitive interface for creating and editing organizational plans.
 - The *General Structures* view allows you to edit organizational plans with any structure including object types which you have defined yourself (teams, for example).
 - The *Matrix* view is for creating and editing matrix structures.
- The **Organizational Plan** mode also includes a view for **workflow administrators**:
 - *Organization and Staffing (Workflow)* provides you with an interface that you can use intuitively to create and edit organizational plans. This interface can be used for *SAP Business Workflow*.
- **Expert mode** enables experienced **experts** object-oriented editing of organizational plans.
 - Expert mode allows you to edit the characteristics of various objects and their relationships via infotypes.
 - The *Simple Maintenance* view in Expert Mode provides an overview of object and structure editing.

For more information, see the documentation on [Expert Mode \[Ext.\]](#).

The [Manager's Desktop \[Ext.\]](#) component provides managers with data on the organizational plan of their area of responsibility and enables them to edit this information.

Organizational Plan

Definition

Representation of the task-related, functional structure of your enterprise, created using tools from the *Organizational Management* component.

This functional organizational plan differs from the administrative enterprise structure and the personnel structure whose elements are relevant to *Payroll Accounting* (company code, personnel subarea or employee group, for example). These structures are found in their corresponding components.

Use

You can create several organizational plans in different [plan versions \[Page 31\]](#), this provides you with the following options in [Organizational Management \[Page 8\]](#):

- in one plan version, you depict your current valid organizational plan which you use for your current business processes (evaluations, Workflow, personnel planning, for example).
- In additional plan versions, you can depict organizational plans as planning scenarios (for Business Process Re-Engineering, for example).

You can compare the current organizational plan with the planning scenarios and transfer data from the simulated structures into the current organizational plan.

Structure

Organizational plans are normally created by assigning **objects** of the following **types** to each other:

- [Organizational Unit \[Page 14\]](#)
- [Position \[Page 20\]](#)
- [Job \[Page 23\]](#)
- [Task \[Page 27\]](#)

If you are using your organizational plan for Workflow, the following object types are also available:

- [Standard task \[Page 28\]](#)
- [Workflow template \[Page 29\]](#)
- [Task group \[Page 30\]](#)

Organizational Plan



The main elements of an organizational plan are

- an [organizational structure \[Page 16\]](#) , with which the reporting structure and task distribution are created using organizational units (departments, for example)
- [Staff assignments \[Page 18\]](#) for each organizational unit, in which the current persons (employees), users and vacancies are listed

Integration

Organizational plans are generally related to objects from other components.

- If [Integration with Personnel Administration \[Ext.\]](#) is active, the personal data for the staff assignments comes from the Personnel Administration component.
 These functional (organizational plan) and administrative (personnel and enterprise structures) structures come into contact if a person is assigned to an organizational plan (as the holder of a position) as well as an enterprise or personnel structure (that is, to a personnel subarea etc.).
- If the [enterprise structure \[Ext.\]](#) is active, account assignment data can be obtained from *Controlling*.

Organizational unit


Organizational unit

Definition

Represents a functional unit in your enterprise, marketing department, for example. According to how tasks are divided up within an enterprise, this could be a department, group or project team, for example.

Organizational units differ from other units in an enterprise such as personnel areas, company codes, business areas etc. These are used to depict structures (administration or accounting, for example) in the corresponding components.

Use

You depict the functional units of your enterprise with  organizational units. You create an [organizational structure \[Page 16\]](#) by assigning these organizational units to each other. The highest organizational unit in an organizational structure is the **root organizational unit**.

You can store characteristics for each organizational unit. These can be

- evaluated using reports
- inherited by subordinate positions (work schedules, for example)

Structure

To define characteristics of an organizational unit, you can store time-specific data for the following areas in the *Organization and Staffing* view:

- Basic Data
- Account Assignment
- Cost distribution
- Address
- Work schedule
- Quota planning

In the *Organization and Staffing (Workflow)* view, you can store data on the following:

- Basic Data
- Account Assignment

See also:

[Editing the Organizational Structure \[Page 61\]](#)

Integration

You can create [staff assignments \[Page 18\]](#) for every organizational unit within an organizational structure.

You can relate an organizational unit to a cost center. For more information, see [Enterprise Organization \[Ext.\]](#).

Organizational Structure

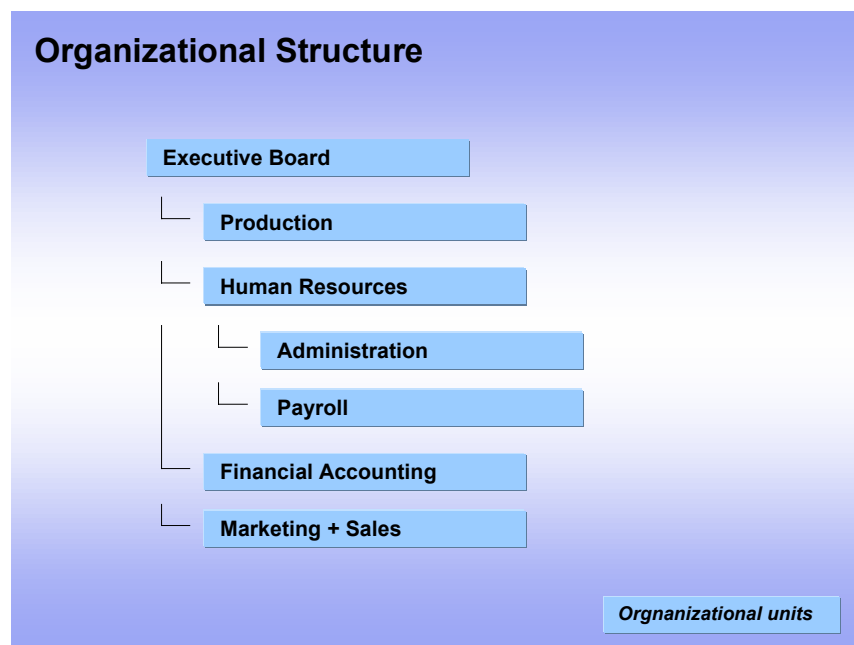
Organizational Structure

Definition

Representation of the reporting structure and the distribution of tasks using organizational units (departments, for example) in an enterprise.

Use

If you want to use Organizational Management and want to create an [organizational plan \[Page 11\]](#), you must create the basic parts of an organizational structure.



Depending on how you want to use *Organizational Management*, you must decide which units you want to include in your organizational structure. For a rough depiction, you can restrict the structure to the main departments. For a more detailed depiction, you can also include subsections and work groups, for example.

According to this organizational structure, you can execute evaluations data, or, in Workflow, you can search for the agent of a task.

You carry out assignments and restrictions in the representation of an organizational structure. For more information, see [Working with Screen Areas \[Page 32\]](#).

See also:

[Editing the Organizational Structure \[Page 61\]](#)

Structure

An organizational structure is made up of [organizational units \[Page 14\]](#) , which represent the departments, work groups etc. in your enterprise.

Integration

For each organizational unit which is an element of an organizational structure, you can create and edit [staff assignments \[Page 18\]](#) .

Staff Assignments

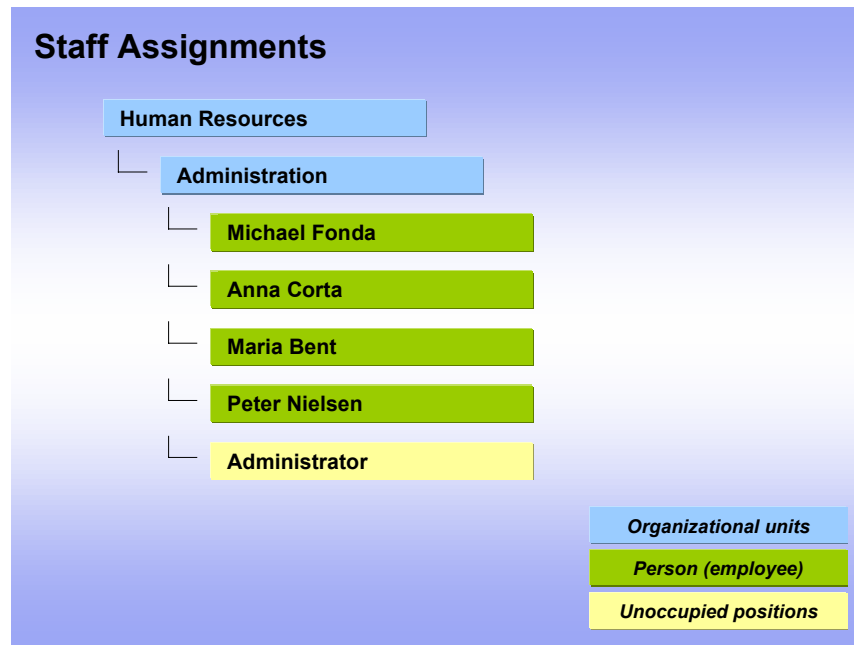
Staff Assignments

Definition

All the persons (employees) and positions belonging to an organizational unit in the past, present and future.

Use

You can create staff assignments for each organizational unit if you are creating an [organizational plan \[Page 11\]](#) .



You use staff assignments to represent the reporting structure and task distribution in your enterprise.

Using staff assignments, you can, for example, run reports for positions and employees or, in Workflow, you can use staff assignments to determine agents for specific tasks.

You carry out assignments and restrictions in the representation of an organizational structure. For more information, see [Working with Screen Areas \[Page 32\]](#).

See also:

[Editing Staff Assignments \[Page 87\]](#)

Structure

Staff assignments list all [persons \[Page 24\]](#) (employees) for an organizational unit, who occupy a [position \[Page 20\]](#) as well as all those who [do not occupy positions \[Page 20\]](#) . As well as this, additional time-specific data on these elements of a staff assignment are displayed.

Integration

You can assign a person (employee) to a position within an organizational unit in *Organizational Management* or in *Personnel Administration*.

Data on a person which is displayed in the staff assignments comes from *Personnel Administration* and *Personnel Development*.

Position

Position

Definition

Represents a post which can be occupied by a person (employee) in the staff assignments of an organizational unit, purchasing administrator, for example.













Positions differ from jobs. A [job \[Page 23\]](#) is not concrete but rather the basis for the creation of various positions with similar tasks and characteristics.

Use





You represent the personnel capacity (headcount) of an organizational unit using positions. By representing the current status of an organizational unit and foreseeable requirements, you create the basis of the [staff assignments \[Page 18\]](#). Only when you have created a position, can you assign [persons \[Page 24\]](#) or [users \[Page 25\]](#) and in so doing complete the staff assignments.

Positions can have the following statuses:





Position status


Status of position	Icon in staff assignments	Text in person/user column	Staffing status in detail area
occupied		Name	
occupied by more than one person		Name	
added during preview period	e.g.  		
goes during preview period	e.g.  		
newly hired person (employee)	e.g.  		
occupied, vacancy is filled		Name	Vacancy filled or withdrawn
occupied and vacant		Name	Vacancy to be filled
unoccupied and vacant		vacant	Vacancy to be filled
unoccupied and not vacant		not vacant	

Position

unoccupied and not vacant, as vacancy has been withdrawn		not vacant	Vacancy filled or withdrawn
occupied and obsolete		Name	Obsolete
occupied by more than one person and obsolete		Name	Obsolete
unoccupied and obsolete		not vacant	Obsolete

A position is

-  **occupied**, if a person (employee) or user is assigned to it
-  **vacant**, if a person (employee) is being found for it The position is marked as vacant in applicant administration in the *Recruitment* component.
-  **unoccupied** and not vacant, if no person (employee) is being found for it
-  **obsolete**, if the position will no longer be required in the future

A position can be flagged as  **Chief position**. Chief positions are evaluated in *SAP Business Workflow*. For more information, see [Role for Determining a Manager \[Ext.\]](#).

You enter all this data according to exact dates.

You can store characteristics for each position. These can be

- evaluated using reports
- used as default values when the position is filled by an employee (planned compensation, working time, for example)

Structure

To define characteristics of a position, you can store time-specific data for the following areas in the *Organization and Staffing* view:

- Basic Data
- Account Assignment
- Address
- Cost distribution
- Work schedule

You can store data on the following in the *Organization and Staffing (Workflow)* view:

See also:

[Editing Staff Assignments \[Page 87\]](#)

Position

A position does not only inherit its tasks and characteristics from this direct assignment. It can also be assigned tasks and characteristics by inheriting them from a [job \[Page 23\]](#) or directly or indirectly from the organizational unit that it belongs to.

Integration

You can assign a person (employee) to a position within an organizational unit in *Organizational Management* or in *Personnel Administration*.

Data on a person (employee) which is displayed in the staff assignments comes from *Personnel Administration*.

Vacant positions are used in *Recruitment*.


Job

Definition

Resource for creating positions.

[Positions \[Page 20\]](#) are concrete and can be held by persons in an enterprise (purchasing administrator, for example). Jobs, in contrast, are classifications of functions in an enterprise (administrator, for example), which are defined by the assignment of characteristics. Jobs serve as job descriptions, that apply to several positions with similar tasks or characteristics.

Use

When creating a new position (purchasing administrator, for example), you can relate it to a  job that already exists (administrator, for example). The position then automatically inherits the tasks and characteristics of the job.

If there is no corresponding job, create one and assign it tasks and characteristics. This will then be available when you add new positions.

This relationship will make it easier for you to create positions that are similar or the same, as you will not have to assign tasks and characteristics to each individual position. You can also assign additional tasks and characteristics directly to positions.



You have 20 administrators in your enterprise. Each one holds a position (purchasing administrator, for example). This position is described by the job administrator and the tasks and characteristics that belong to it. In addition to this, each position (purchasing administrator, for example) can be assigned specific tasks and characteristics (ordering materials, for example), which differentiate it from other positions (personnel administrator, for example).

Structure

You can store basic data for a job.

See also:

[Editing Jobs \[Page 78\]](#)

You can store additional characteristics for a job in [expert mode \[Ext.\]](#).

Person


Person

Definition

An individual, who is listed as an employee in *Personnel Administration*.

For more information, see [Personnel Administration \[Ext.\]](#).

Use

By assigning a  person (employee) to a [position \[Page 20\]](#) , you determine,

- where a person (employee) is functionally assigned in your enterprise
- which tasks a person (employee) performs

Structure

A person (employee) can have tasks assigned to them.

In the *Organization and Staffing* view, you can display data on the following:

- Basic Data
- Qualifications

In the *Organization and Staffing (Workflow)* view, you can display data on the following:

See also:

[Editing Staff Assignments \[Page 87\]](#)

Integration

By assigning a person (employee) to a position, you implement integration between *Organizational Management* and *Personnel Administration*, as long as it is set up in Customizing.

Users

Definition

ID of an R/3 user. Users are maintained in *User Maintenance*.

Use

By assigning a  user to a [position \[Page 20\]](#) , you determine,

- where an R/3 user is functionally assigned in your enterprise
- which tasks an R/3 user performs
- which R/3 users are to be forwarded tasks in a workflow

Structure

You can display basic data on a user.

See also:

[Editing Staff Assignments \[Page 87\]](#)


Tasks



Tasks

Definition






Activity which is performed within an organizational unit.

Use

Using  [tasks \[Page 27\]](#), you can describe the task profile of organizational units in the *Organization and Staffing* view.

Using  [standard tasks \[Page 28\]](#),  [workflow templates \[Page 29\]](#), you can also determine responsibility for tasks relevant to [SAP Business Workflow \[Ext.\]](#), so that the correct agent may be found.

You can assign a task to

- an  organizational unit, if it is to apply to all subordinate positions
- a  job, if it is to apply to all positions described by the job
- a  position, if it is to apply to those persons (employees) or users who hold the position
- a  person (employee), if it is to apply to this person
- a  user, if it is to apply to this user

You can also combine tasks to form [task groups \[Page 30\]](#).

See also:

[Editing Tasks \[Page 117\]](#)

You can store additional characteristics for a task in [expert mode \[Ext.\]](#).

Tasks

Definition

A description of an activity in *Organizational Management* which is performed within an organizational unit. If a task has been assigned an object method, it can have the function of a client-, plan version-, and time dependent single step task (customer task) in *SAP Business Workflow*.

Use

In Organizational Management, you can assign an organizational unit, job, position, person (employee) or user a task in order to describe their function in your enterprise. A task which you assign, represents a characteristic of an object.

In *SAP Business Workflow*, a task, which has been assigned an object method can be used as a customer task. For more information, see [Definition of a Single Step Task \[Ext.\]](#).

Structure

To define characteristics of a task, you can store the following time-specific data:

- Name
- Description

Standard Tasks

Standard Tasks

Definition

Client-, plan version- and time independent single step task in *SAP Business Workflow*.

Use

A standard task can be used both as a single step task or as part of a workflow definition. They are only available in the *Organization and Staffing (Workflow)* view.

For more information, see [Definition of a Single Step Task \[Ext.\]](#).

Structure

You can store basic data for a standard task.

Workflow Templates

Definition

Client-, plan version- and time independent multistep task in *SAP Business Workflow*.

Use

A workflow template can be used directly or as a model for a customer-specific multistep task. Workflow templates are only available in the *Organization and Staffing (Workflow)* view.

For more information, see [Definition of a Multistep Task \[Ext.\]](#).

Structure

You can store basic data for a workflow template.

Task Groups

Task Groups

Definition

Hierarchical combination of tasks that are connected logically or by content.

Use

Task groups are used in *SAP Business Workflow*. They are only available in the *Organization and Staffing (Workflow)* view.

For more information, see [Definition of a Task Group \[Ext.\]](#).

Structure

You can store basic data for a task group.

Plan Versions

Use

Plan versions are scenarios in which you can create organizational plans.

- In the plan version which you have flagged as the active plan version, you create your current valid organizational plan. This is also the integration plan version which will be used if integration with Personnel Administration is active.
- You use additional plan versions to create additional organizational plans as planning scenarios.

As a rule, a plan version contains one organizational structure, that is, one root organizational unit. It is, however, possible to create more than one root organizational unit, that is more than one organizational structure in a plan version.

For more information on creating plan versions, see the Implementation Guide (IMG), under *Personnel Management → Global Settings in Personnel Management → Plan Version Maintenance*.

Using report RHCOPL00, you can copy objects from one plan version to another. For more information, see the report documentation.

Report RHCOPLPT allows you to compare plan versions with one another. For more information, see the report documentation.

Activities

To select a plan version in the *Organization and Staffing* and the *Organization and Staffing (Workflow)* views,

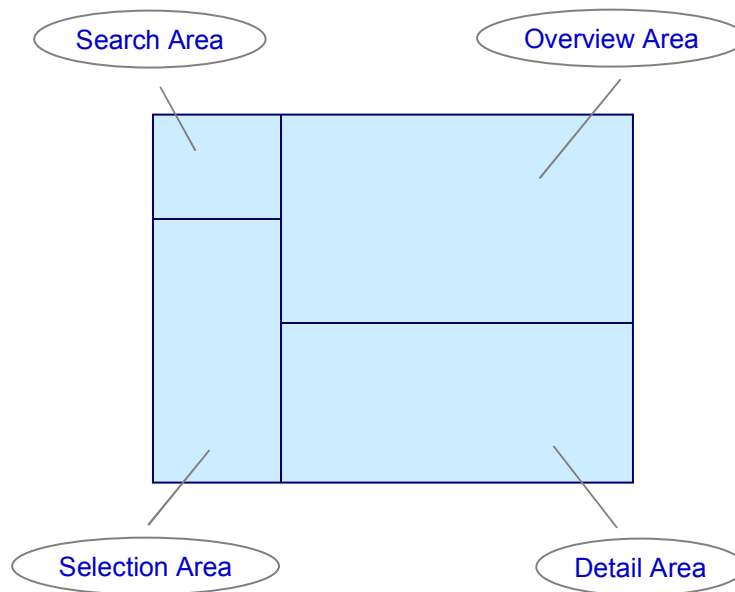
- choose *Settings → Plan version → Active*, to edit the active plan version
- choose *Settings → Plan version → Alternative*, to edit another plan version

Working with Screen Areas

Purpose

You use the user interface in the *Organization and Staffing* or *Organization and Staffing (Workflow)* view to create, display and edit organizational plans.

The user interface is divided into various areas, each of it which fulfills specific functions.



Together, the **search area** and the **selection area** make up the [Objektmanager \[Page 41\]](#)

In the search area you can choose between different **object types**. Depending on whether you are in the *Organization and Staffing* or *Organization and Staffing (Workflow)* view, you are offered different object types to choose from.



Each time you access the *Organization and Staffing* or *Organization and Staffing (Workflow)* views, the objects that you edited last are automatically called up, though (if appropriate) with a new date. You can continue editing the objects directly. In addition, the last user-specific settings relating to the size of the screen, and in some cases the preview period, are available again.

You can reset user-specific settings in the object manager using the report RH_DELETE_OM_USER_SETTINGS. For more information, see the report documentation.

You can reset the last object selection and the preview period using the report RH_DELETE_NF_USER_SETTINGS. For more information, see the report documentation.

Note that the reset takes place across all applications.


Prerequisites

Before you work with screen areas in the Organization and Staffing or Organization and Staffing (Workflow) views, you must be familiar with [Validity \[Page 35\]](#)

You have decided to use either the *Organization and Staffing* or the *Organization and Staffing (Workflow)* view. If necessary, choose the required view over *Goto → Change view*.



Process Flow

A typical work process could look like the following:

1. In the **Search area**, [find \[Page 43\]](#) one or more objects that you want to display or edit, for example:
 - a complete organizational structure
 - all objects of a certain object type, positions, for example
 - one or more objects of a certain object type, for example, a particular organizational unit
2. The objects found are listed in the **Selection area**. Select one of these objects
 - by double clicking on it, if you want to [display \[Page 47\]](#) the object itself including its environment in the overview area and its characteristics in the detail area
 - by clicking on it, if you want to [assign \[Page 53\]](#) it to another object using drag & drop; you can assign a position to an organizational unit, for example
3. In the **Overview area**
 - the selected object including its environment is displayed.
According to the object type the environment can be displayed as
 - *an organizational structure*
 - *a report hierarchy*
 - *staff assignments* in the form of a list or a tree structure
 - *task assignments*
 - *organizational assignments*
 - *job assignments*
 - *a task hierarchy*
 - *an agent*
 - *account assignments*
 - you can, if required
 - switch between these representations of the object's environment using .
 - [create \[Page 50\]](#), [copy \[Page 52\]](#), [assign/move/reposition \[Page 53\]](#), or [delimit/delete \[Page 56\]](#) new objects.
 - select another object

Working with Screen Areas

4. In the **Detail area**, characteristics of the selected object are [displayed \[Page 47\]](#) on tab pages. You can [edit \[Page 47\]](#) the characteristics of this object or add new ones, as required.

Using , you can hide the detail area, so that you can enlarge the overview area. You can display the detail area again using .



In customizing you can define which tab pages should be displayed. For further information, see the Implementation Guide (IMG) under *Personnel Management* → *Organizational Management* → *Hierarchy Framework*.

Validity

Use

An enterprise's organizational plan is constantly undergoing change. For this reason, *Organizational Management* allows you to edit the organizational structure, staff assignments as well as individual objects according to key dates.

You must be familiar with the concept of validity as it is relevant to every step in the *Organization and Staffing* and *Organization and Staffing (Workflow)* views.

Prerequisites

So that you can use validity completely, make sure

- that you know the period for which you want to find and select objects
- when you are creating objects and object characteristics, that you specify the period in which they are to be valid
- when you are assigning objects and object characteristics that you specify the period in which the assignments are to be valid

Features

You determine the validity of an object or assignment when you create it. You control the display of objects by entering key dates and preview periods. For more information, see [Validity of Objects and Assignments \[Page 36\]](#)

You determine the validity of object characteristics when you create them. Changes to data are presented in periods. For more information, see [Validity of Object Characteristics \[Page 40\]](#).

Validity of Objects and Assignments

Validity of Objects and Assignments

Use

So that the presentation of your organizational plan can be exact, objects and assignments between objects exist for a specific period of time. You determine the validity period of objects and assignments when you create them, as required.

Features

Key Date and Preview Period

A key date and a preview period are always set in the *Organization and Staffing* and the *Organization and Staffing (Workflow)* views.

- Every time you log on, the current date is set as the **key date**. You can change the key date. Data valid on the date you have selected is displayed.
- When you logon initially, a **preview period** of 3 months is set, that is, all changes to data that happen in this period are displayed. You can change this preview period. Next time you log on, the **preview period** which you selected is set.

System Response



When you [create \[Page 50\]](#) an organizational unit or position in the **overview area**,

- the validity of the object begins with the key date set, this can be moved forward in the detail area
- the assignment begins with the key date set

If you want the validity of the organizational unit, position or assignment to be restricted, you can terminate them. For more information, see [Terminating Organizational Units \[Page 76\]](#). or [Terminating Positions \[Page 100\]](#)

If you are creating a job or a task, specify the validity date in the dialog box. For more information, see [Creating Jobs \[Page 79\]](#) or [Creating Tasks \[Page 118\]](#). Task and job assignments begin on the key date set.

If you are [finding objects \[Page 43\]](#) in the **search area**, the system selects all the objects that exist on the key date and preview period you set, and presents them for selection in the **selection area**.



Objects whose validity begins only in the preview period set, are indicated by a  in the selection area. Objects, whose validity ends in the preview period, are indicated by a .

If you have selected an object to be [displayed \[Page 47\]](#) , in the **overview area**, according to object type

- the relevant organizational structure and the organizational units assigned to it on the key date or in the preview period is displayed.
- the relevant staff assignments and the positions, persons (employees) or users assigned to it on the key date or in the preview period are displayed.


Validity of Objects and Assignments

- the relevant staff assignments and the positions, persons (employees) or users from an organizational unit assigned to the selected job on the key date or in the preview period are displayed.
- the relevant task assignment and the objects assigned to it on the key date or in the preview period is displayed.

Objects whose assignment to another object begins only in the preview period set, are indicated by a . Objects whose assignment to another object ends in the preview period, are indicated by a .

If you [assign \[Page 53\]](#) an object to another object in the **overview area** or **detail area**, the new assignment applies from the key date to the end of the validity of an object. If you have activated *Query time period for organizational changes*, assignments of organizational units and positions are valid in the period you entered in the *Query time period for organizational changes* dialog box.



Assignments can only be made in the detail area in key date mode. Change the mode by choosing .

Activities

Before you perform a step, check the key date and preview period that are set. Change the settings as required. For more information, see [Selecting a Date and Preview Period \[Page 38\]](#).

Activate/deactivate [Query Time Period for Organizational Changes \[Page 39\]](#)



Selecting a Date and Preview Period

Selecting a Date and Preview Period

Use

To display and edit data according to key dates and time periods, select a key date and preview period.

Procedure

1. Choose *Settings* → *Date and Preview period* (or ).
The *Define Date and Preview Period* dialog box appears.
2. Enter the key date in the *Start Date* field.
3. In the *Preview period* field, enter the preview period.
When you confirm your entries with *Return*, the preview period you selected is displayed.
Correct your entries as required.
4. Confirm your entries by choosing .

Result

You have set a date and a preview period. You can change these settings at any time.

Activating/Deactivating Query Time Period


Use

The validity of assignments normally begins on the key date you have specified. Alternatively, you can activate a dialog box, in which you can enter any validity date when assigning objects (this does not apply when you are assigning persons (employees) or users to positions).

Procedure

1. Choose *Settings* → *Query time for organizational changes*

The *Query time for organizational changes* dialog box appears.

2. Select the *Query time for organizational changes* field, if you want to enter a validity date when you are assigning objects. Otherwise, you can deselect this field.
3. Confirm your entries by choosing .

Result

If you have **activated** the time period query, a dialog box will appear when you move or assign objects, you can enter the validity of the assignment in this dialog box.

If you have **deactivated** the time period query, the validity of the assignment is determined according to the key date.

Validity of Object Characteristics

Validity of Object Characteristics

Use

You store the characteristics of an object on tab pages in the detail area. The characteristics of an object can change with time. For this reason, an exact representation of your organizational plan is available according to a specific time period. You determine the validity of object characteristics, according to your requirements, when you create them.

Features

Key Date and Periods



In the *Organization and Staffing* and the *Organization and Staffing (Workflow)* views

- **period mode** is always set, which displays all existing periods
- **key date mode** is set, this displays the key date and the current period






System Response

Each time data is changed using a tab page in the **detail area**, a new period is created for this tab page. It is valid from the date in the *Valid from* field and until the date in the *Valid to* field. The previous period is automatically terminated on the day before the new period.


A new period is also created, if you make a change outside the detail area, which affects the tab pages, for example, if you create a new position in the overview area.

In key date mode, if more than one period exists for a tab page, this is indicated by a . This indicates that assignments which you are making are valid alongside the current period. If there is only one period, this is indicated by a . In this case, the duration of the new assignment includes the duration of the current period.

Activities

Scroll through the existing periods for object characteristics using  and  or  and . Alternatively, you can use  to select a period directly.

When you are changing data, enter the date from when the data is to be valid in the *Valid from* field, and the date until it is to be valid in the *Valid to* field.

By selecting , switch to key date mode, to assign objects in the detail area.

Object Manager

Use

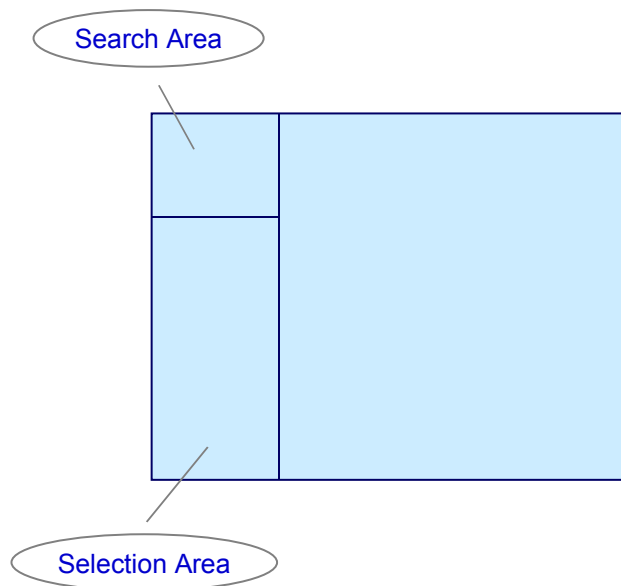
With the *object manager* you can search for and select objects that you want to display or edit.


Prerequisites

You are familiar with the validity concept of the application. The validity concept determines which objects you can find during a search.

Features

The *object manager* consists of the **search area** and the **selection area**.







- In the search area are one or more search functions for each object type, for example the *Search Term* and *Structure Search* functions. These search functions are marked with . In addition, the object type itself can contain a search function. The object types are marked with the respective object type-specific symbol.



If necessary, you can add more object types and search functions in customizing. You can also change the sequence of the search functions. For further information see the Implementation Guide (IMG) under *Personnel Management* → *Global Settings in Personnel Management* → *Settings for Object Manager* or the IMG for *Organizational Management*.

Object Manager

- In the search area you can create **search variants**, so that you can reuse search criteria you have grouped together, or hits. These search variants are marked with .
- In the **selection area** the system displays the objects that you searched for and actually found. According to the search function, this can be either a hit list or a structure.
- You can scroll through search results in the selection area using  and .
- You can completely hide or display the *object manager*, so that the other screen areas get correspondingly bigger or smaller. To do that, choose *Settings* → *Show Object Manager* or *Hide Object Manager*.
- With  you can increase or reduce the size of the selection area, in order to show more hits. As you do that, the search area is hidden or displayed accordingly.



The system saves the last settings relating to screen size and the last object selection user-specifically, and they are available next time you call up the transaction.

You can reset these settings and the last object selection using the report RH_DELETE_OM_USER_SETTINGS. Note that the reset takes place across all applications. For more information, see the report documentation.

- You can call up **generic object services** for a selected object using the right mouse button menu. To do that, select an object in the selection area with the right mouse button and choose *Generic Object Services*. For further information about generic object services, see [List of Object Services \[Ext.\]](#).

Finding/Selecting Objects

Use

In the **Search area** you can search for one or more objects that you want to display or edit.

For each object type there are various **search functions**, for example:

- Search Term
- Structural Search
- Free Search

Prerequisites

Objects you are searching for must already exist. Create new objects as required.

The required object types and search functions are set up.

Procedure


1. In the **search area** select one of the available search functions and if necessary enter the required selection criteria.
 In the **selection area** the system displays all found objects with the corresponding object type, either as a list or as a structure.
2. Double-click on the required object.

Using Search Tools

Using Search Tools


Use

With the search tools for each object type you can search for objects in various object type-specific ways.

These search tools are marked with . In addition, the object type itself can contain a search tool. The object types are marked with the respective object type-specific symbol.



Prerequisites

You are familiar with how the search tools are assigned.

- In the search area, the object type itself can contain a search tool. The object types are marked with the respective object type-specific symbol.
- Search tools can be positioned under the corresponding object type. In that case it is marked with .

Procedure

Searching for Objects Using a Search Term

1. Choose *Search Term* (or the required object type, if it has this search function).
The *Search for <object type>* dialog box appears.
2. Enter a name. This can be a name, abbreviation or numeric ID. You can also search using the entry * .
3. Restrict the number of hits, if required. Enter whether the object you are looking for is **directly** or **indirectly** assigned to another object.
4. Choose  *Search*.
The results of the search are displayed in the **selection area**. The display in the overview and detail areas does not change.
5. If necessary, you can start another search for the same object type and then choose  *Insert* to add the new hits to the first results in the selection area.
6. Double-click on the required object in the selection area.

Searching for Objects Using Free Search

The *Free Search* search tool uses the *InfoSet Query*.


1. Choose *Free Search* (or the required object type, if it has this search function).
The *Find Objects of Type <Object type>* dialog box appears. For further information, see [HR in the InfoSet Query \[Ext.\]](#). After the search, the system displays the search results in the **selection area**.
2. Double-click on the required object in the selection area.

Searching for Objects Using Structure Search

1. Choose *Structure Search* (or the required object type, if it has this search function).


In the **selection area** the system displays all found objects of the relevant object type in a tree structure, ordered according to their assignment in the organizational plan.



If necessary, you can refresh the hits displayed in the selection area using . This is recommended, for example, if you have created new objects shortly before.

2. Expand the structure until the required object is revealed.



To display unrelated objects, choose .

3. Double-click on the required object in the selection area.

Using Search Variants

Using Search Variants

Use

In some search functions, for example *Search Term*, you can restrict the number of hits by using a combination of selection criteria. You can then save such a combination as a **search variant** so that you can use it again. You can also delete a search variant again, if necessary.


Procedure


Creating Search Variants

1. Use one of the search functions to search for objects.

The system displays the hits in the **selection area**.

2. Choose  and enter a name. Choose .

The system saves the search criteria as a search variant and assigns them to the corresponding object type in the **search area**. The search variant is marked with .

3. Select the search variant you created and choose . You can check your search criteria.

Searching for Objects Using a Search Variant


1. Select a search variant.

The hits are displayed in the **selection area**.

2. Double-click on the required object.

Deleting Search Variants

1. Select the search variant that you want to delete.

2. Choose .

The search variant is deleted.


Displaying/Editing Objects

Use

You can allocate numerous characteristics to the organizational objects in an organizational plan. Select an object in the **selection area** or **overview area** so that you can display the characteristics of the object in the **detail area** and, if required, edit them.

Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

It can be that the detail area is hidden. In order to display and edit object characteristics, you may need to redisplay the detail area using .

Procedure

Selecting and Displaying Objects

You can select objects either in the selection area or in the overview area:

- In the **overview area**, select an object by double-clicking on it.



You can only select an object from the selection area if you have already searched for one or more objects in the [search area \[Page 43\]](#).

The object itself is displayed in the **overview area**. The following display types are possible:

Organizational Unit

- *Organizational structure*: structural display showing the assignment of an organizational unit to other organizational units.
- *Task assignment*: structural display showing the assignment of an organizational unit to tasks and activity groups.
- *Report hierarchy*: structural display showing the assignment of an organizational unit to a chief position and its holder (person or user).
- *Staff assignments (list)*: list display showing the assignment of an organizational unit to the subordinate positions and their holders.
- *Staff assignments (structure)*: structural display showing an organizational structure and the assignment of each organizational unit to the subordinate positions and their holders.

Position

- *Task assignment*: structural display showing the assignment of positions to tasks and activity groups.
- *Report hierarchy*: structural display showing the higher- and lower-level assignments of positions.

Displaying/Editing Objects

- *Organizational assignment*: structural display showing the assignment of a position to higher-level organizational units.

Job

- *Task assignment*: structural display showing the assignment of jobs to tasks and activity groups.
- *Job usage*: structural display showing the assignment of a job to positions.

Person


- *Organizational assignment*: structural display showing the assignment of a person over positions to higher-level organizational units.
- *Task assignment*: structural display showing the assignment of persons to tasks and activity groups.
- *Report hierarchy*: structural display showing the higher- and lower-level assignments of positions and their holders.


User

- *Organizational assignment*: structural display showing the assignment of a user over positions to higher-level organizational units.
- *Task assignment*: structural display showing the assignment of users to tasks and activity groups.

Task, Standard Task, Workflow Template, and Task Group

- *Task hierarchy*: structural display showing the assignment of a task to other tasks and activity groups.
- *Agent*: structural display showing the assignment of a task to other organizational objects.

You can display the exact evaluation path for the current display using .





To switch between displays, select the required object and choose . The system proposes the various display types available.



To move up a level within a displayed structure, choose .

- In the **overview area**, double-click on an object that is displayed in a structure or list.

The characteristics of the selected object are displayed in the **detail area**.



Scrolling

In the **overview area** you can scroll through the displays using  and . If you have already made changes to data but have not yet saved them, you can use  and  to undo or recreate the last change.

In the **detail area**, you can use  and  or  and  to scroll through the periods that exist for an object.

Editing the Characteristics of an Object

In the **detail area** you can edit the characteristics of the object you selected.

1. Select a tab page.
2. Make the appropriate entries. For more information, see [Editing Organizational Units \[Page 66\]](#)
[Editing Positions \[Page 91\]](#)
[Editing Jobs \[Page 83\]](#)
[Editing Tasks \[Page 123\]](#)
3. Save your entries by choosing .
 On tab pages containing characteristics there is a .

Creating Objects

Creating Objects

[Planstelle bearbeiten \[Page 88\]](#)

[Stelle bearbeiten \[Page 79\]](#)

[Aufgabe bearbeiten \[Page 118\]](#)

Use

You depict the functional structure of your enterprise as an [organizational plan \[Page 11\]](#), by creating organizational objects (organizational units, positions etc.) in the **overview area** and assigning them to objects that already exist.



Prerequisites

To create a root organizational unit for a new organizational plan, you must be in **Create mode** (*Organization and Staffing Create* or *Organization and Staffing (Workflow) Create*).

Create additional organizational objects

- in **Create mode**, if you are going to create additional objects straight away once you have created the root organizational object, without leaving the mode.
- in **Change mode** (*Organization and Staffing Change* or *Organization and Staffing (Workflow) Change*), if you have left create mode.

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.



Which objects you can create depends on which display type is currently in the **overview area**. If necessary, check which assignments can be displayed in your particular case, using . If necessary, use  to switch to a display type in which you can carry out the required assignment.

For more information on the display types, see [Displaying/Editing Objects \[Page 47\]](#)

Procedure

Creating Root Organizational Units


You have chosen create mode.

1. In the *Create a root organizational unit* dialog box, enter the required validity period of the root organizational unit and confirm with .
The system creates a root organizational unit with the provisional name "New Organizational Unit".
2. In the detail area, replace the preset entries for object name and object description on the *Basic data* tab page with the name of your choice.
3. Save your entries by choosing .

You have created your root organizational unit.

Creating Organizational Objects in the Structural Display

1. In the overview area, select the object to which you want to assign the object being created.

2. Choose .

The *Choose Relationship* dialog box appears.

3. Select an object type.

The system creates the object.

4. Over the tab pages in the **detail area**, edit the characteristics of the new object.

For further information according to object type, see:


[Editing Organizational Units \[Page 66\]](#)

[Editing Positions \[Page 91\]](#)

[Editing Jobs \[Page 83\]](#)

[Editing Tasks \[Page 123\]](#)

Creating Positions in Staff Assignments (List)

1. Choose .

The system creates the new position.

2. Over the tab pages in the **detail area**, edit the characteristics of the new object.



You can also create new objects by copying. For more information, see [Copying Objects \[Page 52\]](#).

You can always assign objects to other objects – not just when you create them. For more information, see [Assigning Objects \[Page 53\]](#).

Copying Objects

Copying Objects




Use

You can create a new object by copying an object which already exists. When you do this, all the characteristics of the object are copied.

Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

1. In the overview area, select the object which you want to copy.
2. Choose :
The *Copy Object* dialog box appears.
3. Specify the number of copies you wish to make and the validity period which is to apply to the new objects.
4. Choose :
The new object is created. The object's tab pages will be filled with the characteristics of the template. The characteristics can be changed or enhanced as required.
5. Save your entries by choosing .







































Assigning/Moving/Repositioning Objects

Use

An organizational plan depicts the functional relationships in your enterprise. To depict such relationships (the hierarchy of organizational units or the staffing of positions by persons, for example), you assign objects to each other. Objects can be

- **newly assigned** if they are not yet assigned.
- **moved**, that is, you end the object's current assignment in a structure and create a new assignment within the same structure.
- **repositioned** within a hierarchy level in a structure.



The following can be target positions:

- An  **organizational unit** can be assigned to objects of the following types:
 Organizational Unit,  Task,  Standard Task,  Workflow Template,  Task Group
- A  **position** can be assigned to objects of the following types:
 Organizational Unit,  Task,  Standard Task,  Workflow Template,  Task Group
- A  **person (employee)** or  user can be assigned to objects of the following types:
 Position,  Task,  Standard Task,  Workflow Template,  Task Group
- A  **position** can be assigned to objects of the following types:
 Position,  Task,  Standard Task,  Workflow Template,  Task Group
- A  **task**, a  **standard task**, a  **workflow template** or a  **task group** can be assigned to objects of the following types:
 Organizational Unit,  Position,  Job,  Person,  User,  Task,  Standard Task,  Workflow Template,  Task Group.

Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

 You can only assign  standard tasks,  workflow templates and  task groups in the *Organization and Staffing (Workflow)* view.

Which objects you can assign/move/reposition depends on which display type is currently in the **overview area**. If necessary, check which assignments can be displayed in your particular case, using . If necessary, use  to switch to a display type in which you can carry out the required assignment.

For more information on the display types, see [Displaying/Editing Objects \[Page 47\]](#)

Assigning/Moving/Repositioning Objects

Procedure

Assigning Objects

1. Search for an object that already exists, but does not yet belong to the current structure. For more information, see [Finding Objects \[Page 43\]](#).
2. In the **selection area**, select the object that you want to assign to another object.
3. Holding down the left mouse button, drag the object to the target position. The target position can be an object in a structural display or a field in the staff assignments (list) display.

The system assigns the object.

4. Save your entries by choosing .



Moving Objects

1. In the **overview area**, select the object that you want to move.
2. Hold down the left mouse button and drag the object to the object to which you want to assign it.

The object has moved and is therefore newly-assigned.

3. Save your entries by choosing .

Repositioning Objects


1. In the **overview area**, select the object that you want to reposition.
2. Choose  or  to reposition the object in a higher or lower position within the hierarchy level.

The object has been repositioned. Therefore, the sequence of objects on a hierarchy level has changed.



3. Save your entries by choosing .

Assigning/Moving Using a Pushbutton

As an alternative to assigning or moving with drag & drop, you can also use the  pushbutton.

1. In the **overview area**, select the object that you want to assign to another object.
2. Choose .

The *Restrict allowed values* dialog box appears.

3. Search for the object that you want to assign, select it and then choose .
4. Save your entries by choosing .

Terminating/Deleting Objects or Assignments

Terminating/Deleting Objects or Assignments



Use

You can:

- Terminate organizational objects if you want to limit their validity.
- Terminate the assignment of an organizational object to another organizational object if you want to limit the validity of this assignment.
- Delete an organizational objects, if you want to delete them completely, including their history.
- Delete the assignment of an organizational object to another organizational object, if you want to delete this assignment and its history completely.





Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period. Choose key date mode in the detail area.

Which objects/assignments you can terminate/delete depends on what is displayed in the **overview area**. Check which assignments can be depicted in a particular case by choosing . If necessary, switch to a display in which you can terminate/delete the object or assignment by choosing .



For more information on the displays, see [Displaying/Editing Objects \[Page 47\]](#).

Procedure

1. In the **overview area**, select the object which you want to terminate/delete or whose assignment you wish to delete.
2. Choose  if you want to terminate, or  if you want to delete.
3. Choose whether you want to terminate/delete the object or the assignment.
If you want to terminate, enter the date from which the object/assignment is to be terminated in the dialog box, and choose .
The object / the assignment is terminated/deleted.
4. Save your entries by choosing .

Undoing/Recreating Changes

Use




If you have already made changes to data in the overview area, but have not yet saved them, you can use  and  to undo or recreate them.

Prerequisites

You have changed data but you have **not** yet saved.

A change (no assignment) in the detail area: You have confirmed the change with Return, or you carried out another activity after the change, chosen another tab page, for example.

Procedure

1. Choose  to undo the last change.
The change is undone.
2. Choose  to recreate the last change.
The change is recreated.
3. Save your entries by choosing  when you want to finally confirm your changes.

Confirmation Prompt

Confirmation Prompt

Use

Once you have carried out a specified number of changes to data (specified in Customizing), a dialog box appears asking whether you want to save these changes. Thus you can avoid losing data.

Prerequisites

You define the number of steps that are carried out before the confirmation prompt appears in Customizing. For further information, see the Implementation Guide (IMG) under *Personnel Management* → *Organizational Management* → *Framework* → *Set Up Confirmation Prompt*.

Activities

Save data as required.

Configuring Columns


Use

You can decide which columns should be displayed in different screen areas.

Prerequisites

The columns that are available are determined in Customizing. For further information see the Implementation Guide (IMG) under *Personnel Management* → *Global Settings in Personnel Management* → *Column Framework* or the IMG for *Organizational Management*.

Procedure

1. Choose .

The *Column configuration* dialog box appears.

2. Select the columns that you want to display.

Some entries represent column groups, that is, more than one column will be displayed if you select one of these entries.

3. Confirm your entries by choosing .

Result

The columns you selected are displayed.



You can reset all of a user's column configurations using the report RH_DELETE_COL_USER_SETTINGS. Note that the reset takes place across all applications. For more information, see the report documentation.

Switching Maintenance Interfaces

Switching Maintenance Interfaces

Use

You can replace the *Organization and Staffing* and the *Organization and Staffing (Workflow)* views with *Simple Maintenance*. You may want to switch if, for example, you have already used *Simple Maintenance* and you want to work with the maintenance interface you are used to. For more information on *Simple Maintenance*, see [Simple Maintenance \[Ext.\]](#).

In addition, you can jump to *Infotype maintenance* from a selected object. For more information, see [Infotype Maintenance \[Ext.\]](#).

Procedure

Situation A: You are in *Organization and Staffing* or *Organization and Staffing (Workflow)* view and want to switch to *Simple Maintenance*.

Choose *Settings* → *Maintenance Interface*. You access *Simple Maintenance*.


If you do not change this setting, you will automatically access *Simple Maintenance* when you call up a maintenance interface in the future.

Situation B: You want to reverse this setting. You are in *Simple Maintenance*.


Choose *Settings* → *Maintenance Interface*. The *Organization and Staffing* interface appears.

When you call up a maintenance interface in future, the *Organization and Staffing* view will appear.

Situation C: You are in neither of the two maintenance interfaces; you want to select an interface.

In the SAP menu choose *Human resources* → *Organizational management* → *Settings* → *Set maintenance interface*. The *Set maintenance interface* dialog box appears. Select a maintenance interface and confirm by choosing . If you do not change this setting, you will automatically access the interface you select when you call up a maintenance interface in the future.

Situation D: You have selected an object in the *Organization and Staffing* maintenance interface and displayed its characteristics in the detail area. You want to go to the infotype maintenance for this object.

Choose *Goto* → *Detail object* → *Enhanced object description*. To get back to the *Organization and Staffing* view, choose .

Editing the Organizational Structure

Use

You want to:

- create an [Organizational Structure \[Page 16\]](#) as the basis for the [Organizational Plan \[Page 11\]](#) of your company.
- make changes to the organizational structure or to individual [Organizational Units \[Page 14\]](#).

Features

In the *Organization and Staffing* and the *Organization and Staffing (Workflow)* views, you can

- create an organizational structure by creating organizational units,
- display the entire organizational structure or individual organizational units,
- change the organizational structure, that is, create, assign, terminate or delete organizational units,
- assign characteristics to organizational units.

Creating Organizational Units

Creating Organizational Units

Use

You create organizational units to create an organizational structure.

Prerequisites

You must first have created a **root organizational unit**. For more information, see [Creating Objects \[Page 50\]](#) and [Organizational Units \[Page 14\]](#)

You are familiar with [Validity \[Page 35\]](#) Select a key date and preview period.

Procedure

1. Select an organizational unit (the root organizational unit, for example) in the organizational structure in which you want to create a new organizational unit.

The organizational structure is displayed in the overview area.

For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

2. In the overview area, select the organizational unit that you want to be the parent object of the new organizational unit.

3. Choose .

The new organizational unit is displayed in the overview area. The tab pages showing the properties of the new organizational unit are displayed in the detail area.

4. Replace the default short and long descriptions on the *Basic Data* tab page with names of your choice.

For more information on editing characteristics, see [Editing Organizational Units \[Page 66\]](#).

5. Save your entries by choosing .



For information on how to restrict the validity of your organizational unit or its assignments, see [Delimiting/Deleting Organizational Units or Assignments \[Page 76\]](#).

Result

The new organizational unit is created.

- The position is valid from the key date entered in the detail area or from the key date that you entered on the *Basic Data* tab page.
- The organizational unit is assigned to the parent organizational unit from the key date entered in the overview area.

Assigning/Moving/Repositioning Organizational Units

Assigning/Moving/Repositioning Organizational Units

Use

To make changes to your company's organizational structure, you can

- assign an organizational unit that already exists to an organizational structure which it is not already assigned to
- move an organizational unit, that is, end its assignment within the organizational structure and reassign it within the organizational structure
- reposition an organizational unit within a hierarchy level



You can also assign a task to an organizational unit. For more information, see [Assigning Tasks \[Page 121\]](#).

Prerequisites

You have already created an organizational structure, there are further organizational units, which are not yet assigned to this organizational structure.

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Select an organizational unit (the root organizational unit, for example) from the organizational structure which you want to restructure. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#). The organizational structure is displayed in the overview area.

Procedure

Assigning Organizational Units

1. Find an organizational unit, which already exists but which is not yet assigned to this organizational structure. For more information, see [Finding Objects \[Page 43\]](#).

The organizational unit is displayed in the selection area.

2. Select this organizational unit in the selection area.
3. Holding down the left mouse button, drag the organizational unit to the organizational unit, which you want to assign it to in the overview area.

The organizational unit is assigned to the superior organizational unit. To see the validity of the assignment, see [Activating/Deactivating Query Time Period \[Page 39\]](#).

4. Save your entries by choosing .

Moving Organizational Units

1. In the overview area, select the organizational unit which you want to move.

You can also select this organizational unit in the selection area, if it is listed.



2. Holding down the left mouse button, drag the organizational unit to the organizational unit, which you want to assign it to in the overview area.

Assigning/Moving/Repositioning Organizational Units

The organizational unit is assigned to the superior organizational unit. To see the validity of the assignment, see [Activating/Deactivating Query Time Period \[Page 39\]](#).

3. Save your entries by choosing .

Repositioning Organizational Units

1. In the overview area, select the organizational unit which you want to reposition.
2. Choose , if you want to move the organizational unit up within the hierarchy level. Choose , if you want to move the organizational unit down within the hierarchy level.

The organizational unit is repositioned. As only the sequence of organizational units within the hierarchy level has changed, the date of the assignment remains the same.

3. Save your entries by choosing .

Result

You have restructured your organizational structure.



For information on how to restrict the validity of an assignment, see [Terminating/Deleting Organizational Units or Assignments \[Page 76\]](#).

Editing Organizational Units

Use

You can store numerous characteristics for each organizational unit used in *Organizational Management* and/or other components. Some characteristics of organizational units are inherited by subordinate organizational units and positions if they have not been maintained.

Prerequisites


You have already created an [organizational unit \[Page 62\]](#).

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

1. Select an organizational unit. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

The organizational structure concerned is displayed in the overview area, the characteristics of the organizational unit are displayed in the detail area.

2. Select a tab page in the detail area.
3. Make the appropriate entries.
4. Save your entries by choosing .

Basic Data (Organizational Unit)

Definition

The basic characteristics of an organizational unit.

Use

Basic data provides organizational units with a unique identity.

Structure

- **Short and long descriptions**

In the two *organizational unit* fields, enter a short and long description for an organizational unit. These descriptions are displayed in the organizational structure, the staff assignments, etc.


- **Staff**

By choosing the *Staff* field, you can assign a staff indicator to positions or organizational units. A staff flag indicates that an organizational unit or position is not part of the normal reporting structure at your company, but rather reports directly to a high level position, or organizational unit. A position can, therefore, report directly to a member of the executive board and an organizational unit can report directly to the executive board.

- **Department**

By choosing the *Department* field, you can assign a department indicator to organizational units. It is only necessary to flag organizational units as departments if integration between Organizational Management and Personnel Administration is active.

- **Basic Data for Staff Assignments**

Basic data on the staff assignments for an organizational unit are displayed in the Staff assignments table. To display all staff assignments, select an organizational unit in the overview area and choose .

- **Describing Texts**

You can create various texts. Select a text type and enter a text.

Integration

The fields on this tab page are integrated with infotypes from the *Organizational Management Expert Mode [Ext.]* as follows:

- Short and long name: [Object \(infotype 1000\) \[Ext.\]](#)
- *Staff* field: [Department/Staff \(infotype 1003\) \[Ext.\]](#)
- *Department* field: [Department/Staff \(infotype 1003\) \[Ext.\]](#)
- Describing texts: [Description \(infotype 1002\) \[Ext.\]](#)

Basic Data (Organizational Unit)

Account Assignment (Organizational Unit)

Definition

Specification of a controlling area, master cost center, company code, business area, personnel area and personnel subarea for an organizational unit.

Use

You specify the account assignment features of an organizational unit. Inheritance occurs as follows:

- Account assignment features are inherited by subordinate organizational units and positions if they have not been maintained.
- If account assignment features have been specified for a superior organizational unit, these are overwritten by entries on the *Account Assignment* tab page for a subordinate organizational unit.

Structure

- **Controlling Area**
You can assign a controlling area to an organizational unit.
- **Cost Center**
You can assign a cost center to an organizational unit. This forms the basis for [Cost Distribution \[Page 98\]](#). The cost center can only be maintained in the Organization and Staffing view if integration with the [Enterprise Organization \[Ext.\]](#) is **not activated**.
- **Company Code**
You can assign a company code to an organizational unit.
- **Business Area**
You can assign a business area to an organizational unit.
- **Personnel Area**
You can assign a personnel area to an organizational unit.
- **Personnel Subarea**
You can assign a personnel subarea to an organizational unit.

Integration

Data on the controlling area, cost center, company code, business area, personnel area and personnel subarea is inherited by subordinate positions and organizational units, as long as they have no direct assignment of their own.

Data on the controlling area, company code, business area, personnel area and personnel subarea are used as default values in *Personnel Administration*.

Data on the cost center is transferred to *Personnel Administration* in infotype 0001.

Account Assignment (Organizational Unit)

Whether the cost center can be maintained in the *Organization and Staffing* view depends on whether integration with the [Enterprise Organization \[Ext.\]](#) is activated or deactivated.

The fields on this tab page are integrated with infotypes from the *Organizational Management Expert Mode [Ext.]* as follows:

- Controlling area: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Master cost center: [Relationship \(infotype 1001\) \[Ext.\]](#)
- Company code: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Business area: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Personnel area: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Personnel subarea: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)

Address (Organizational Unit)

Definition

Specification of a first or second address for an organizational unit.

Use

Enter detailed standard information for an organizational unit.

Structure

The first or second address for an organizational unit contains the following:

- **Address supplement**
You can enter an address supplement, for example a postal code or c/o address.
- **Street/house number**
You can enter the street and house number as a part of the address.
- **Town**
You can enter the name of the town or city
- **Postal code**
You can enter the postal code for the address.
- **Country**
You can enter a key which represents a particular country.
- **Region**
You can enter the name of the region (or the name of a state, county or province etc.) if it is relevant to the address in a particular country. This is country-specific.
- **Telephone number**
You can enter the telephone number of the organizational unit.
- **Fax number**
You can enter the fax number of the organizational unit.
- **E mail address**
You can enter the e mail address of the organizational unit.

Integration

The fields on this tab page are integrated with [Infotype 1028 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Cost Distribution (Organizational Unit)

Cost Distribution (Organizational Unit)

Definition

Distribution of costs arising to several cost centers.

Use

Costs incurred by an organizational unit are usually written to the cost center directly assigned to the organizational unit (master cost center) or the cost center inherited by the organizational unit. For more information, see [Account Assignment \(Organizational Unit\) \[Page 69\]](#).

Create a cost distribution if you wish to distribute costs to more than one cost center. Enter which portion of the costs you would like to distribute to which cost center. If the organizational unit is already assigned a master cost center, the left-over share will be written to this cost center.



If the organizational unit was assigned a master cost center before it was created, you must reconcile cost distribution with this.

Subordinate position and organizational units inherit cost distribution, if they have not been assigned their own master cost center or cost distribution.

You will find the *Cost Distribution* tab page in the *Organization and Staffing (Workflow)* view.

Structure

In the table which is displayed, you can enter the percentage of costs that is to be distributed to each cost center. You can also assign orders and WBS elements.

Integration

The fields on this tab page are integrated with [Infotype 1018 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Working Time (Organizational Unit)

Definition

The time which is to be worked by persons (employees) or users that occupy a subordinate position.

Use

You can specify which group of positions are to work for which planned working times.

You will find the *Working Time* tab page in the *Organization and Staffing (Workflow)* view.

Structure

- **Work Schedule Group**

You can combine positions into work schedule groups in Customizing in order to reduce data entry time. On this tab page you can specify a work schedule for each work schedule group that exists (and their subordinate positions).

- **Work schedule**

Working times are entered in this field.

- **Origin**

Enter the origins of the work schedule in this field. If the work schedule comes from the rule value definition in Customizing, enter *Standard Entry*. If the work schedule has been inherited from a superior organizational unit, the name of the organizational unit is displayed.

- **Percentage**

The entry in this field specifies the percentage of the *work schedule* corresponds to the *planned working time*.

- **General Work Schedule**

You can flag the work schedule that you have assigned to an organizational unit as the general working time for the unit itself and for all objects under it in the organizational structure. The general working time is assigned to all subordinate organizational units, positions or employee groups if they have no individual working time assignment. Individual working time assignments of subordinate objects override the work schedules they inherit from superior organizational units.

For more information (particularly on inheritance), see [Work Schedules \[Ext.\]](#).

Integration

The fields on this tab page are integrated with [Infotype 1011 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Working Time (Organizational Unit)

Quota Planning (Organizational Unit)

Definition

Headcount planning for an organizational unit.

Use

You can plan how many and which positions are to be assigned in the staff assignments for an organizational unit in the future. Planning can be activated in [Expert Mode \[Ext.\]](#).

The *Quota Planning* tab page is not available in the *Organization and Staffing (Workflow)* view.

Structure

- **Displayed Periods**

Enter the planning period. The period displayed results from settings made in Customizing. For further information, see the Implementation Guide (IMG) under *Organizational Management* → *Infotype Settings* → *Set Up Quota Planning*.

- **Time Interval**

You select the time interval in which the data is to appear in the table displayed. For further information, see the Implementation Guide (IMG) under *Organizational Management* → *Infotype Settings* → *Set Up Quota Planning*.

- **Planning Type**

You can execute several plans. Activate one of the planning types in Customizing. For further information, see the Implementation Guide (IMG) under *Organizational Management* → *Infotype Settings* → *Set Up Quota Planning*.

- **Table**

For each job that describes at least one position in the organizational unit, the table displays how many positions (which are described by this job) currently belong to the organizational unit. The amount of *planned* positions is also shown in the table. In active planning, you can enter *Planned* in the appropriate fields.

Integration

The fields on this tab page are integrated with [Infotype 1019 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Terminating/Deleting Organizational Units or Assignments

Terminating/Deleting Organizational Units or Assignments

Use

You can:

- terminate an organizational unit, if you want to limit the validity of the organizational unit (the current assignment is also deleted)
- terminate the assignment of an organizational unit, if the organizational unit is no longer to be assigned
- delete an organizational unit, if you want to delete it completely, including its history



Prerequisites



Select an organizational unit. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying/Editing Objects \[Page 47\]](#).

The organizational unit is displayed in the overview area.



Procedure

Terminating Organizational Units or Assignments

1. Choose an organizational unit from the overview area.
2. Choose
 -  and then *Object*, if you want to terminate the validity of the organizational unit.
 -  and then *Assignment*, if you want to terminate the assignment of the organizational unit to a superior organizational unit

In the first case, the *Terminate on* dialog box appears, in the second, the *Terminate relationship* dialog box.
3. Enter the date on which the organizational unit or assignment is to be terminated.
4. Confirm your entries by choosing .
5. Save your entries by choosing .

Deleting Organizational Units or Assignments

1. Choose an organizational unit from the overview area.
2. Choose
 -  and then *Object*, if you want to delete the organizational unit
 -  and then *Assignment*, if you want to delete the assignment of the organizational unit to a superior organizational unit

The organizational unit or assignment is deleted.

Terminating/Deleting Organizational Units or Assignments

3. Save your entries by choosing .

Editing Jobs

Editing Jobs

Use

You create [jobs \[Page 23\]](#) in order to simplify the procedure of creating [positions \[Page 20\]](#).

Features

You can:

- Create jobs
- Display jobs
- Assign jobs
- assign characteristics to jobs

Creating Jobs

Use

You create jobs so that you can use them to create positions.





Prerequisites

- First check whether a suitable job already exists, so that you do not need to create a new one. In the search area, select one, several, or all existing jobs. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).
You can display data on the job you have selected in the detail area.
- You are familiar with [Validity \[Page 35\]](#).
- Before creating a new job, you have checked which position you want to assign the new job to.

Procedure

1. Choose *Edit* → *Create Job*.
2. A dialog box appears. In the relevant fields, enter the validity period of the job, and enter a short and a long name.
In the lower section of the dialog box is a list of the existing jobs in your organizational plan. If, by mistake, you enter the name of an already existing job, the system will inform you.
3. Choose *Create*.

Alternatively, you can create jobs and assign them to positions at the same time:

1. In the selection area, double-click on the position to which you want to assign the new job.
The system displays the *Task Assignment* in the overview area.
 2. Choose :
The *Choose Relationship* dialog box appears.
 3. Select the object type *Job* and confirm with .
 4. In the dialog box which appears, enter the period for which the job is to be valid in the *Valid from* field.
 5. Confirm your entries by choosing .
- You have created the job and assigned it to the relevant position.
6. In the detail area, you can enter a long and short name for the new job in the *Job* fields.
- Save your entries by choosing .



For information on how to delimit or delete job assignments, see [Delimiting/Deleting Job Assignments \[Page 85\]](#)

Creating Jobs

Result

You have created one or more jobs.

Assigning Jobs

Use

You assign jobs to positions so that the position inherits the characteristics of the job.



You can also assign a job to a task. For more information, see [Assigning Tasks \[Page 121\]](#).

Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

You have selected the staff assignments which include the position to which you want to assign the job. For more information, see [Displaying Objects \[Page 47\]](#).

Procedure

1. Find a job that already exists. For more information, see [Finding Objects \[Page 43\]](#).

The job is displayed in the selection area.

2. Select this job in the selection area.
3. Holding down the left mouse button, drag the job to the *Job* column of the position in the *Staff assignments (List)*.

The job is assigned. To see the validity of the assignment, see [Activating/Deactivating Query Time Period \[Page 39\]](#).



You can also assign a position to a job by entering the job on the *Basic Data* tab page for the position. For more information, see [Basic Data \(Position\) \[Page 92\]](#).

4. Save your entries by choosing .



For information on how to terminate or delete job assignments, see [Terminating/Deleting Job Assignments \[Page 85\]](#).

Result

You have assigned the job.

Assigning Jobs

Editing Jobs

Use

You can store numerous characteristics for each job used in *Organizational Management* and/or other components.



You can create and edit further characteristics in [Expert Mode \[Ext.\]](#).

Prerequisites


You have already created a [job \[Page 79\]](#).

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

1. Select a job. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

The characteristics of the job are displayed in the detail area.

2. Select a tab page in the detail area.
3. Make the appropriate entries.
4. Save your entries by choosing .

Basic Data (Job)

Basic Data (Job)

Definition

The basic characteristics of a job.

Use

Basic data provides jobs with a unique identity. The characteristics of a job are inherited by the positions that are created using the job as a basis.

Structure

- **Short and long names**

In the two *Job* fields, enter a short and long name for a job. These names are displayed in the staff assignments and the job index, for example.

- **Descriptive Texts**

You can create various texts. Select a text type and enter a text.

Integration

The fields on this tab page are integrated with infotypes from the *Organizational Management* Expert mode as follows:

- Long and short name: [Object \(Infotype 1000\) \[Ext.\]](#)
- Descriptive Texts: [Description \(Infotype 1002\) \[Ext.\]](#)

Terminating/Deleting Job Assignments

Use

You can:

- terminate a job assignment, if you no longer want the job to be assigned to a position
- delete the job, if you want to delete it completely, including its history

Prerequisites

Select the position for which you want to terminate/delete the assignment. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying/Editing Objects \[Page 47\]](#).

The position is displayed in the overview area.

Procedure

Terminating Job Assignment

3. In the selection area, double-click on the position whose assignment to a job you wish to terminate.

The *Task assignments* appear in the overview area.

2. Select the job.

3. Choose and then *Assignment*.

The *Terminate Relationship* dialog box appears.

5. Enter the date on which the job assignment is to be terminated.

The job assignment is terminated.

5. Save your entries by choosing .

Deleting Job Assignment

1. In the selection area, double-click on the position whose assignment to a job you wish to delete.

The *Task assignments* appear in the overview area.

2. Select the job.

3. Choose and then *Assignment*.

The job assignment is deleted.

4. Save your entries by choosing .

Terminating/Deleting Job Assignments

Editing Staff Assignments

Use

Create [Staff assignments \[Page 18\]](#) for an organizational unit, so that you can specify

- which [positions \[Page 20\]](#) belong to the organizational unit
- which positions are occupied by which [persons \(employees\) \[Page 24\]](#) and [users \[Page 25\]](#).
- which positions are not occupied

Prerequisites

Staff assignments can only be created for organizational units that already exist.

Features

In the *Organization and Staffing* and the *Organization and Staffing (Workflow)* views, you can

- create staff assignments by creating positions
- display staff assignments or individual positions, persons (employees) or users
- assign positions, persons (employees) and users
- assign characteristics to positions

Creating Positions

Creating Positions

Use

You create positions to define the positions in an organizational unit that are to be occupied.

Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.


You have selected staff assignments. For more information, see [Displaying Objects \[Page 47\]](#).

Procedure

Creating Positions in the Staff Assignments (Structure)

1. In the selection area, double-click on the organizational unit that you want to assign the new position to.



The organizational structure is displayed in the overview area.

2. Select the organizational unit to which you want to assign the new position.
3. Choose  and then *Staff Assignment (Structure)*.

The *Staff assignments (Structure)* appear.

4. Choose .

The *Select Relationship* dialog box appears.

4. Select the object type *Position* and confirm your entry by choosing .
5. In the dialog box which appears, enter the period for which the position is to be valid in the Valid from field.
7. Confirm your entry by choosing .

The new position is displayed in the staff assignments.

8. Replace the default short and long descriptions on the *Basic Data* tab page with names of your choice.

For more information on editing characteristics, see [Editing Positions \[Page 91\]](#).

9. Save your entries by choosing .







For information on how to restrict the validity of your position or its assignments, see [Terminating/Deleting Positions or Assignments \[Page 100\]](#).

Creating Positions in the Staff Assignments (List)

1. In the selection area, double-click on the organizational unit that you want to assign the new position to.

The organizational structure is displayed in the overview area.

2. Select the organizational unit to which you want to assign the new position.

3. Choose  and then *Staff Assignment (List)*.
The *Staff assignments (List)* appear.
4. Choose :
5. In the dialog box which appears, enter the period for which the position is to be valid in the Valid from field.
6. Confirm your entry by choosing .
The new position is displayed in the staff assignments.
7. Replace the default short and long descriptions on the *Basic Data* tab page with names of your choice.
For more information on editing characteristics, see [Editing Positions \[Page 91\]](#).
8. Save your entries by choosing .



For information on how to restrict the validity of your position or its assignments, see [Terminating/Deleting Positions or Assignments \[Page 100\]](#).

Result

The new position is created.

The position is valid from the key date entered in the detail area or from the key date that you entered on the *Basic Data* tab page.

The organizational unit is assigned to the parent organizational unit from the key date entered in the overview area.

Assigning Positions

Assigning Positions

Use

To make changes to your company's organizational structure, you can assign positions that already exist to an organizational unit.



You can also assign other objects to a position. For more information, see [Assigning Objects \[Page 53\]](#).

Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

You have selected the staff assignments to which you want to assign a position. For more information, see [Displaying Objects \[Page 47\]](#).

Procedure

1. Find a position, which already exists but which is not yet assigned to these staff assignments. For more information, see [Finding Objects \[Page 43\]](#).

The position is displayed in the selection area.

2. Select this position in the selection area.
3. Holding down the left mouse button, drag the position to free area of the staff assignments.

The position is assigned to the staff assignments and the organizational unit. To see the validity of the assignment, see [Activating/Deactivating Query Time Period \[Page 39\]](#).

4. Save your entries by choosing .



For information on how to restrict the validity of an assignment, see [Terminating/Deleting Positions or Assignments \[Page 100\]](#).

Result

You have assigned the position.

Editing Positions

Use


You can store numerous characteristics for each position used in *Organizational Management* and/or other components.

Prerequisites

You have already created a [position \[Page 88\]](#).

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

1. Select a position. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).
 The staff assignments concerned are displayed in the overview area, the characteristics of the position are displayed in the detail area.
2. Select a tab page in the detail area.
3. Make the appropriate entries.
4. Save your entries by choosing .

Basic Data (Position)

Basic Data (Position)

Definition

The basic characteristics of a position.

Use

Basic data provides positions with a unique identity. It also provides you with information on your enterprise's staffing status.

Structure

- **Short and long descriptions**

In the two *Position* fields, enter a short and long description for a position. These descriptions are displayed in the staff assignments, for example.

- **Job**

The job assigned to the position is displayed in the *Job* field. You can assign a job directly by entering its name here. Otherwise, you assign a job to a position in the staff assignments. For more information, see [Assigning Jobs \[Page 81\]](#).

- **Chief of Organizational Unit**

By flagging this field, you mark a position as the chief position of the organizational unit to which it belongs.



You can also flag a chief position of an organizational unit on the [Chief+Account Assignment \[Page 69\]](#) tab page.

Chief positions are evaluated in *SAP Business Workflow*. For more information, see [Role for Determining a Manager \[Ext.\]](#).

- **Staffing Status**

You can enter the following statuses in this field:

Vacancy open – the position is vacant, that is, a person (employee) is to be found for the position. The position is marked as vacant in *Recruitment*.

Vacancy occupied or put on hold – the position was vacant, however, no person is to be found for the position at the present time.

Obsolete – the position will no longer be required in the future-.

For more information, see [Position \[Page 20\]](#).

- **Staff**

By choosing the *Staff* field, you can assign a staff indicator to positions. A staff flag indicates that a position is not part of the normal reporting structure at your company, but rather reports directly to a high level position, or organizational unit. In this way, a position can report directly to the chief executive officer.

- **Holder**

Basic Data (Position)

Persons (employees) and users who occupy the corresponding positions are displayed in the *Holder* table

- **Describing Text**

You can create various texts. Select a text type and enter a text.

Integration

The fields on this tab page are integrated with infotypes from the *Organizational Management Expert Mode* [\[Ext.\]](#) as follows:

Short and long text: [Object \(infotype 1000\) \[Ext.\]](#)

Job: [Relationship \(infotype 1001\) \[Ext.\]](#)

Chief of an organizational unit: [Relationship \(infotype 1001\) \[Ext.\]](#)

Staffing status: [Vacancy \(infotype 1007\) \[Ext.\]](#) and [Obsolete \(infotype 1014\) \[Ext.\]](#)

Staff: [Department/Staff \(infotype 1003\) \[Ext.\]](#)

Holder: [Relationship \(infotype 1001\) \[Ext.\]](#)

Describing text: [Description \(infotype 1002\) \[Ext.\]](#)

Account Assignment (Position)

Account Assignment (Position)

Definition

Specification of a controlling area, master cost center, company code, business area, personnel area and personnel subarea for a position.

Use

You specify the account assignment features of a position. If account assignment features have been specified for a superior organizational unit, these are overwritten by entries on the *Account Assignment* tab page for a position.

The *Account Assignment* tab page is not available in the *Organization and Staffing (Workflow)* view.

Structure

- **Controlling Area**

The controlling area assigned to the position is displayed.

- **Cost Center**

You can assign a master cost center to a position. This forms the basis for [Cost Distribution \[Page 98\]](#).

- **Company Code**

You can assign a company code to a position.

- **Business Area**

You can assign a business area to a position.

- **Personnel Area**

You can assign a personnel area to a position.

- **Personnel Subarea**

You can assign a personnel subarea to a position.

Integration

Data on the controlling area, company code, business area, personnel area and personnel subarea are used as default values in *Personnel Administration*.

Data on the cost center is transferred to *Personnel Administration* in infotype 0001.

The fields on this tab page are integrated with infotypes from the *Organizational Management Expert Mode [Ext.]* as follows:

- Controlling area: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Master cost center: [Relationship \(infotype 1001\) \[Ext.\]](#)
- Company code: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Business area: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)

Account Assignment (Position)

- Personnel area: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)
- Personnel subarea: [About the Account Assignment Features Infotype \(1008\) \[Ext.\]](#)

Address (Position)

Address (Position)

Definition

Specification of a first or second address for a position.

Use

You can enter detailed information on the specific physical location of a position.

Structure

The first or second address for a position contains the following:

- **Building**
You can enter the specific building for which an address is stored.
- **Address supplement**
You can enter an address supplement, for example a postal code or c/o address.
- **Street/house number**
You can enter the street and house number as a part of the address.
- **Town**
You can enter the name of the town or city
- **Postal code**
You can enter the postal code for the address.
- **Country**
You can enter a key which represents a particular country.
- **Region**
You can enter the name of the region (or the name of a state, county or province etc.) if it is relevant to the address in a particular country. This is country-specific.
- **Telephone number**
You can enter the telephone number of the position.
- **Fax number**
You can enter the fax number of the position.
- **E mail address**
You can enter the e mail address of the position.

Integration

The fields on this tab page are integrated with [Infotype 1028 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Cost Distribution (Position)

Cost Distribution (Position)

Definition

Distribution of costs arising to several cost centers.

Use

Costs incurred by a position are usually written to the cost center directly assigned to the position (master cost center) or the cost center inherited by the organizational unit. For more information, see [Account Assignment \(Position\) \[Page 94\]](#).

Create a cost distribution if you wish to distribute costs to more than one cost center. Enter which portion of the costs you would like to distribute to which cost center. If the position is already assigned a master cost center, the left-over share will be written to this cost center.



If the position was assigned a master cost center before it was created, you must reconcile cost distribution with this.

You will find the *Cost Distribution* tab page in the *Organization and Staffing (Workflow)* view.

Structure

In the table which is displayed, you can enter the percentage of costs that is to be distributed to each cost center. You can also assign orders and WBS elements.

Integration

The fields on this tab page are integrated with [Infotype 1018 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Working Time (Position)

Definition

The time which is to be worked by persons (employees) or users that occupy the corresponding position.

Use

You specify the planned working time for the persons (employees) or users for this position.

You will find the *Working Time* tab page in the *Organization and Staffing (Workflow)* view.

Structure

- **Employee group**
You assign an employee group to the position.
- **Employee subgroup**
You assign an employee subgroup to the position.
- **Origin**
Enter the origins of the work schedule in this field. If the work schedule comes from the rule value definition in Customizing, enter *Standard Entry*. If the work schedule has been inherited from a superior organizational unit, the name of the organizational unit is displayed.
- **Work schedule**
Working times are entered in this field.
- **Approval**
The entry in this field specifies the percentage of the *work schedule* corresponds to the *planned working time*.

For more information (particularly on inheritance), see [Work Schedules \[Ext.\]](#).

Integration

The fields on this tab page are integrated with infotypes from the *Organizational Management Expert Mode [Ext.]* as follows:

- Employee group/subgroup: [Employee Group/Subgroup \(infotype 1013\) \[Ext.\]](#)
- Work schedule: [Work Schedule \(infotype 1011\) \[Ext.\]](#)

Terminating/Deleting Positions or Assignments

Terminating/Deleting Positions or Assignments

Use

You can:



- terminate a position, if you want to limit the validity of the position (the current assignment is also deleted)
- terminate the assignment of a position, if the position is no longer to be assigned
- delete a position, if you want to delete it completely, including its history

Prerequisites



You are in the *Staff assignments (Structure)*. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying/Editing Objects \[Page 47\]](#).

Procedure

Terminating Positions or Assignments



4. Select a position.
5. Choose
 -  and then *Object*, if you want to terminate the validity of the position
 -  and then *Assignment*, if you want to terminate the assignment of the position to a superior organizational unit

In the first case, the *Terminate on* dialog box appears, in the second, the *Terminate relationship* dialog box.


- 6. Enter the date on which the position or assignment is to be terminated.
- 7. Confirm your entries by choosing .
- 6. Save your entries by choosing .

The position or assignment is terminated.

Deleting Positions or Assignments

4. Select a position.
5. Choose
 -  and then *Object*, if you want to delete the position
 -  and then *Assignment*, if you want to delete the assignment of the position to a superior organizational unit

The position or assignment is deleted.

- 6. Save your entries by choosing .

Assigning Persons/Users

Assigning Persons/Users

Use

You assign a person (employee) or user to a position so that you can define who occupies positions in your enterprise. More than one person (employee) and/or user may occupy a position.



You can also assign a person (employee) or a user to a task. For more information, see [Assigning Tasks \[Page 121\]](#).

Prerequisites

Persons (employees) or users, which you want to assign to a position must already have been created.

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

You have selected the staff assignments which include the position to which you want to assign a person (employee) or user. For more information, see [Displaying Objects \[Page 47\]](#).

Procedure

1. You are in the staff assignments. The position to which you want to assign the person (employee) or user is displayed.
2. Find the person (employee) or user that you want to assign. For more information, see [Finding Objects \[Page 43\]](#).

The person or user is displayed in the selection area.

3. Select the person or user from the selection area.
4. With the left mouse button held down, drag the person or user to the position displayed in the staff assignments.



Alternatively, you can drag the person (employee) or user to the *Holder* field on the *Basic data* tab page for the position in the detail area.

The *Assign Persons* or *Assign Users* dialog box appears.

5. Enter a validity period for the assignment and select a personnel action.

If the person (employee) or user already holds a position, you can specify that this previous assignment is to continue to exist by selecting the *Additional occupancy* field.

Otherwise, you can specify that this assignment is to be terminated (that is the person or user is to be transferred to the new position) by flagging the *Transfer* field.

6. Confirm your entries by choosing .

If you are transferring a person (employee) or user, the *Create vacancy* dialog box appears. Specify until when the current position is to be occupied. Confirm your requirements with *Yes* or *No*.

Assigning Persons/Users

If the new position was vacant, the *Delimit vacancy* dialog box appears. Specify if and when this position is to be delimited. Confirm your requirements with *Yes* or *No*.

7. Save your entries by choosing .

The person (employee) or user is assigned to the position from the date entered.

Result

You have assigned the person to the position.

Transferring a Person

Transferring a Person

Use

You transfer a person (employee) from one position to another, and delimit the existing assignment of the person (employee) to the position.

If a corresponding workflow has been set up in the system, and if you select an action type during the transfer, an employee in the personnel department receives a work item for carrying out the personnel action. See also [Transferring a Person - Workflow \[Page 106\]](#)

Prerequisites

People (employees) who you want to transfer to another position must already be created and occupy a position.

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

You have selected the staff assignments that include the position to which you want to transfer a person (employee). For more information, see [Displaying Objects \[Page 47\]](#).

Procedure

1. You are in one of the two staff assignment views, where the position to which you want to transfer a person (employee) is displayed.
5. Find the person (employee) that you want to transfer. For more information, see [Finding Objects \[Page 43\]](#).

The person is displayed in the selection area.

6. Select this person in the selection area.
7. Holding down the left mouse button, drag the person to the position displayed in the staff assignments.

The *Assign Persons* dialog box appears.

6. Enter a validity period for the assignment and select a personnel action type.



The personnel actions that appear here are specified in the view *V530_all*. Note that the corresponding workflow only starts if you enter a personnel action type here. See also [Transferring a Person - Workflow \[Page 106\]](#)

By selecting the *Transfer* field, you specify that the previous assignment is to be delimited, in other words that the person (employee) is to be transferred to the new position.

With the *Delimit relationship* indicator, select the person-position assignment that you want to delimit. If you do not make a selection here, the person is not transferred, but is assigned to a new position in addition to the one he/she is already assigned to.

7. Confirm your entries by choosing .

Transferring a Person

If you are transferring a person (employee), the *Create vacancy* dialog box appears. Specify whether, and until when, the old position is to be vacant. Confirm your requirements with *Yes* or *No*.

If the new position was vacant, the *Delimit vacancy* dialog box appears. Specify if and when the vacancy for this position is to be delimited. Confirm your requirements with *Yes* or *No*.

8. Save your entries by choosing .

The person (employee) is assigned to the position from the date entered.

Result

You have transferred the person to another position. The new assignment is displayed in the staff assignments.

Transferring a Person (Workflow)

Transferring a Person – Workflow

Use

You are transferring person (employee) from one position to another. During the transfer, you want to trigger a workflow that sends the personnel department a work item for carrying out the personnel action you specify. For information about transferring a person (employee) to another position, see [Transferring a Person \[Page 104\]](#).

Prerequisites

To trigger the transfer workflow, the following conditions must be met:

- You have set up an appropriate workflow. For further information, especially about customizing for this workflow, see under the *SAP Easy Access Menu* → *Tools* → *ABAP Workbench* → *Development* → *Workflow* → *Definition Tools* → *Tasks/Task Groups* → *Display*. Choose *Workflow Template* and enter *01000014* (for workflow template codes, see transaction *PFWS*). Note that the standard workflow template does not necessarily match your enterprise-specific requirements.
- The PLOGI EVENB (*Enhanced Integration*) and PLOGI EVCRE (*Create Event for Entry T77INT*) switches in table T77S0 are set to 'X'. Compare the *Set Up Integration with Personnel Administration* section, in the Implementation Guide (IMG) for *Organizational Management*.
- When the *Assign Person* dialog box appears as you are transferring the person in Organizational Management, select a personnel action type. The system only offers a choice of those personnel action types that were specified as being relevant to Organizational Management in the view *V530_all*.

Procedure

1. You want to transfer a person, and have already carried out steps 1 to 4 of the [Transferring a Person \[Page 104\]](#) procedure.
2. In the Assign Person dialog box, select a personnel action and make the entries described in steps 5 and 6 of the [Transferring a Person \[Page 104\]](#) procedure.
3. Save your entries.
4. The employee in the personnel department then receives the *Decision* work item in his or her inbox (Transaction SWLD – Integrated Inbox).
5. The employee in the personnel department can then execute, change (in other words, enter a different personnel action type), or undo the personnel action.
 - If the personnel action selected by you is carried out, both the administrator and the person (employee) affected by the action are informed by mail – both receive the mail in their inbox.
 - If the action is undone, the system displays in Organizational Management the original position of the objects in the organizational structure (that is, their position before the transfer procedure). After the action is undone, the employee in the personnel department receives notification by mail in his/her inbox.

Transferring a Person (Workflow

- If you undo the reorganizational action (the transfer), the workflow that was started is automatically canceled.

Result

The employee in the personnel department has executed the work item relating to the transfer workflow that you triggered.

Terminating/Deleting Person/User Assignments

Terminating/Deleting Person/User Assignments

Use

You can

- terminate the assignment of a person (employee) or user to a position, if the person or user is no longer to be assigned
- delete the assignment of a person (employee) or user to a position if you want to delete the assignment.


Prerequisites

You are in the *Staff assignments (Structure)*. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying/Editing Objects \[Page 47\]](#).

Procedure

Terminating Assignment

6. Select the a person (employee) or user.

4. Choose  and then *Assignment*.

The *Terminate Relationship* dialog box appears.

8. Enter the date on which the position or assignment is to be terminated.

6. Confirm your entries by choosing .

The *Create Vacancy* dialog box appears.

You can create a vacancy for the position and enter a validity start date for the vacancy.

5. Choose *Yes*, *No* or *Cancel*.


The assignment is terminated.



If a position is not occupied and you select a field from the Person/User column using the right mouse button, the menu path *Terminate* → *Object* appears. You can use this to terminate the validity of the position.

Delete Assignment

1. Select the a person (employee) or user.

4. Choose  and then *Assignment*.

The *Create Vacancy* dialog box appears.

You can create a vacancy for the position and enter a validity start date for the vacancy.

3. Choose *Yes*, *No* or *Cancel*.

The assignment is deleted.

Terminating/Deleting Person/User Assignments

Displaying/Editing Personal Data

Use

Numerous characteristics are stored for persons (employees) and users in *Personnel Administration* and *Personnel Development*. You can display some characteristics in *Organizational Management*. You can also assign tasks and positions.

Prerequisites


The characteristics of a person (employee) are stored in *Personnel Administration* or *Personnel Development*.

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

1. Select a person (employee). For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

The characteristics of the person (employee) are displayed in the detail area.

2. Select a tab page in the detail area.
3. Make the appropriate entries.
4. Save your entries by choosing .

Basic Data (Person)

Definition

The basic characteristics of a person (employee).

Use

Entering basic data can provide a person (employee) with a unique organizational assignment.

Structure

The *Position assignment* table on the *Basic data* tab page contains the following data on the organizational assignment of a person:

- **Position**

This column of the table displays the position or positions to which the person (employee) is assigned. You can use Drag & Drop to assign positions. For more information, see [Assigning Persons/Users \[Page 102\]](#).
- **Job**

The job on which the position is based is displayed in this column of the table.
- **Position ID**

The ID of the position which the person (employee) occupies is displayed in this column.
- **Organizational unit**

This column contains the organizational unit to which the position that the person (employee) occupies is assigned.
- **Percentage**

This column contains the staffing percentage of the position, that is the percentage of his or her working time the person (employee) occupies the position.
- **Valid from**

This column contains the start date of the assignment of the person (employee) to the position.
- **Valid to**

This column contains the end date of the assignment of the person (employee) to the position.

Integration

The *Position assignment* table is integrated with [Infotype 1001 \[Ext.\]](#) from the *Organizational Management Expert Mode [Ext.]*.

Basic Data (Person)

Qualifications (Person)

Definition

A person (employee)'s qualifications.

Use

Provides information on a person (employee)'s qualifications.

The *Qualifications* tab page is not available in the *Organization and Staffing (Workflow)* view.

Structure

The qualifications and additional information are displayed in the table.

Integration

The data displayed comes from the *Personnel Administration* component.

Displaying/Editing User Data

Use

Numerous characteristics are stored for users in *User Maintenance*. You can display some of these characteristics in *Organizational Management*. You can also assign tasks and positions.

Prerequisites


Characteristics for a user have been created in *User Maintenance*.

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

5. Select a user. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

The characteristics of the user you selected are displayed in the detail area.

6. Select a tab page in the detail area.
7. Make the appropriate entries.
8. Save your entries by choosing .

Basic Data (User)

Definition

The basic characteristics of a user.

Use

Using basic data, a user can be provided with a unique organizational assignment.

Structure

The *Position assignment* table on the *Basic data* tab page contains the following data on the organizational assignment of a user:

- **Position**
This column of the table displays the position or positions to which the user is assigned. You can use Drag & Drop to assign positions. For more information, see [Assigning Persons/Users \[Page 102\]](#).
- **Job**
The job on which the position is based is displayed in this column of the table.
- **Position ID**
The ID of the position which the user occupies is displayed in this column.
- **Organizational unit**
This column contains the organizational unit to which the position that the user occupies is assigned.
- **Percentage**
This column contains the staffing percentage of the position, that is the percentage of his or her working time the user occupies the position.
- **Valid from**
This column contains the start date of the assignment of the user to the position.
- **Valid to**
This column contains the end date of the assignment of the user to the position.

Integration

The *Position assignment* table is integrated with [Infotype 1001 \[Ext.\]](#) from the *Organizational Management Expert Mode [Ext.]*.

Basic Data (User)

Editing Tasks

Use

You create [Tasks \[Page 26\]](#).

- to describe your organizational objects
- so that [SAP Business Workflow \[Ext.\]](#) relevant tasks are forwarded to the correct agent.

Features

You can:

- Create tasks
- Assign tasks
- Display tasks
- Assign characteristics to tasks

Creating Tasks

Creating Tasks

Use

You create tasks so that you can assign them to other organizational objects.

Prerequisites

- Check whether a suitable task exists already, so that you can avoid creating a new task: Select one or more of the existing tasks from using the search area. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

You can display data on the task you have selected in the detail area.

- You are familiar with [Validity \[Page 35\]](#).
- Before you create a new task, you must have specified which organizational object you want to assign the new task to.

Procedure

The procedure for creating a task varies according to the organizational object you want to assign the task to.

Creating Tasks (Job/Position)


3. In the selection area, double-click on the job/position that you want to assign the new task to.

The job/position is displayed in the overview area and the characteristics of the job/position are displayed in the detail area.

4. Select a job/position from the overview area.

5. Choose :

The *Select Relationship* dialog box appears.

5. Select the object type *Task* and confirm your entry by choosing .

8. In the dialog box which appears, enter the period for which the task is to be valid in the Valid from field.

9. Confirm your entry by choosing .

The task is created and assigned to the relevant job/position.

10. In the detail area, you can enter a short name for the task in the *Object abbreviation* field. You can enter a long name in the *Name* field.


11. Save your entries by choosing .

Creating Tasks (Organizational Unit)


1. In the selection area, double-click on the organizational unit that you want to assign the new task to.

The organizational structure for the organizational unit concerned appears.




2. In the overview area, select the organizational unit to which you want to assign the new task.

3. Choose  and then Task assignment.

The tasks assigned to the organizational unit are displayed.

4. Choose .


The *Select Relationship* dialog box appears.

5. Select the object type *Task* and confirm your entry by choosing .
 6. In the dialog box which appears, enter the period for which the task is to be valid in the Valid from field.
 7. Confirm your entries by choosing .
- The task is created and assigned to the relevant position.
8. In the detail area, you can enter a short name for the task in the *Object abbreviation* field. You can enter a long name in the *Name* field.
 9. Save your entries by choosing .

Creating Tasks (Person/User)

1. In the selection area, double-click on the person (employee) or user to which you want to assign the new task.




The *Organizational assignment* appears in the overview area.

2. Select the a person (employee) or user from the overview area.
3. Choose  and then Task assignment.

The *Task assignments* appear.

4. Select the a person (employee) or user and choose .

The *Select Relationship* dialog box appears.

5. Select the object type *Task* and confirm your entry by choosing .
 6. In the dialog box which appears, enter the period for which the task is to be valid in the Valid from field.
 7. Confirm your entries by choosing .
- The task is created and assigned to the relevant person (employee) or user.
8. In the detail area, you can enter a short name for the task in the *Object abbreviation* field. You can enter a long name in the *Name* field.
 9. Save your entries by choosing .



For information on how to terminate or delete task assignments, see [Terminating/Deleting Task Assignments \[Page 127\]](#).

Result

You have created one or more tasks.

Creating Tasks

Assigning Tasks

Use

You assign tasks to organizational objects (organizational units, positions, jobs, persons (employees) or users),

- to describe the activities that they have to perform
- so that SAP Business Workflow relevant tasks are forwarded to the correct agent



Prerequisites

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.


Procedure

You can either assign tasks to objects or objects to tasks. The results will be identical.

Assigning an Object to a Task

1. Select a task. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying/Editing Objects \[Page 47\]](#).
2. Double-click on the task in the selection area.
The task is displayed in the overview area.
3. Choose  and then *Agent*.
The objects that are already assigned to the task are displayed.
4. Search for an object that you want to assign to the task. For more information, see [Finding Objects \[Page 43\]](#).
5. The object is displayed in the selection area.
6. Select this object in the selection area.
7. Holding down the left mouse button, drag the object to the task in the overview area.
The task is assigned to the object. For more information on the validity of the assignment, see [Activating/Deactivating Query Time Period \[Page 39\]](#).
8. Save your entries by choosing .

Assigning a Task to an Object

You assign a task to an object in the *Task assignments* in the overview area. If you are not in the Task assignments, choose  → *Task assignment*.

1. The object is displayed in the overview area.
2. Select a task. For more information, see [Finding Objects \[Page 43\]](#).
The task is displayed in the selection area.
3. Holding down the left mouse button, drag the task to the object in the overview area.

Assigning Tasks

The object is assigned to the task. To see the validity of the assignment, see [Activating/Deactivating Query Time Period \[Page 39\]](#).

4. Save your entries by choosing .



For information on how to terminate or delete task assignments, see [Terminating/Deleting Task Assignments \[Page 127\]](#).

Editing Tasks

Use

You can store basic data for a task which you can use to describe the task more clearly.



You can create and edit further characteristics in [Expert Mode \[Ext.\]](#).

Prerequisites


You have already created a [task \[Page 118\]](#).

You are familiar with [Validity \[Page 35\]](#). Select a key date and preview period.

Procedure

1. Select a task. For more information, see [Finding Objects \[Page 43\]](#) and [Displaying Objects \[Page 47\]](#).

The characteristics of the task are displayed in the detail area.

5. Select a tab page in the detail area.
6. Make the appropriate entries.
7. Save your entries by choosing .

Name




Name

Definition

The basic characteristics of a task.

Use

You can identify a task by making entries on the *Name* tab page. You can also translate the short and long names of the task.


The tab page is not available for  Standard tasks,  Workflow templates and  Task groups in the Organization and Staffing (Workflow) view.

Structure

- **Planning status**

In this field, you can specify the planning status of the task in the planning cycle.

- **Language**

The logon language is displayed here, if it has been maintained. You can overwrite the long and short names by choosing . Via *Maintain translation*, you can translate the short and long names into another language and thus create various language-versions of your task.

- **Object abbreviations**

You can overwrite the short name for your task.

- **Name**

You can overwrite the long name for your task.

Integration

The fields on this tab page are integrated with [Infotype 1000 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.




Description

Definition

Description of a task.

Use

The Description tab page provides you with a description of a task.

The tab page is not available for  Standard tasks,  Workflow templates and  Task groups.

Structure


- **Planning status**

In this field, you can specify the planning status of the task in the planning cycle.

- **Language**

The description of the task in the logon language is displayed here, if it has been maintained.

- **Subtype**

If you choose  , possible entries appear to aid you in your selection of a text type in which you can enter a text. If you choose *Maintain translation*, you can create the text in another language. The original validity period is used for this function.

Integration

The fields on this tab page are integrated with [Infotype 1002 \[Ext.\]](#) from the [Expert Mode \[Ext.\]](#) of *Organizational Management*.

Basic Data


Basic Data

Definition

The basic characteristics of a task relevant to workflow.

Use

The entries you make on the *Basic data* tab page enable tasks to be forwarded to the relevant agent for execution in [SAP Business Workflow \[Ext.\]](#).

This tab page is not available for  Tasks in the *Organization and Staffing* view.

Structure

- **General Task**

If you set this indicator, you specify that all users can carry out this task in Workflow.

- **General forwarding not Allowed**

Using this indicator, you specify that these tasks may only be forwarded to certain users who are the agents of these tasks. If this indicator is not set, this task may be forwarded to all users.

For more information on using these two indicators in *SAP Business Workflow*, see [Agent Assignment Maintenance \[Ext.\]](#).

- **Locked Against Execution**

Specifies that a work item for this task or this workflow process has been created but can not be executed.

- **Locked For Instantiation**

Specifies that no work item has been created for this workflow process or task.

For more information on using these two indicators in *SAP Business Workflow*, see [Classification and Lock Indicator Maintenance \[Ext.\]](#).

- **Classification**

Tasks can be classified as professional, personal or disciplinary, however, you do not have to assign them to a class.

For more information on using this indicator in *SAP Business Workflow*, see [Classification and Lock Indicator Maintenance \[Ext.\]](#).

- **Release Status**

Using this indicator, you specify the status of a task. You can specify whether a task is to be generally released or implemented or whether it is obsolete.

Delimiting/Deleting Task Assignments

Use

You can:

- delimit a task assignment, if you no longer want it to be assigned to a job
- delete the task assignment, if you want to delete it completely, including its history

Prerequisites



In the selection area, select the task whose assignment to another organizational object you want to delimit/delete.

Procedure


Delimiting Task Assignments

7. In the selection area, double-click on the task.

The task is displayed in the overview area; the basic properties of the task are displayed in the detail area.



5. Select the task in the overview area.
6. Choose  and then *Task usage*.
7. Select the object whose assignment to the task you want to delimit.
8. Choose  and then *Assignment*.

The *Delimit Relationship* dialog box appears.

9. Enter the date on which the task assignment is to be delimited.
10. Confirm your entries by choosing .

The task assignment is delimited.

Deleting Task Assignments

2. Repeat steps 1 to 3 above.
5. Select the object whose assignment to the task you want to delete.
3. Choose  and then *Assignment*.
The task assignment is deleted.
4. Save your entries by choosing .

General Structures

General Structures

Use

As well as the standard object types used in Organizational Management, you can include objects types, which you have defined yourself (teams, for example) in the structure.

This function is used, for example, when editing dimensions within the [Matrix Organization \[Page 130\]](#). See also [Structure Maintenance \[Page 141\]](#)

Prerequisites

To be able to edit and display functions, you must do the following in the initial screen

- determine the object type of the start object
- enter the object ID and abbreviation of the start object
- enter an evaluation path

When you enter a start object and evaluation path, a structure appears, in which you can edit and display objects or relationships as well as create new objects and relationships.

Evaluation paths determine the objects and relationships that are to be edited or displayed as well as the new objects and relationships that may be created.

You may only edit and display objects and relationships beneath the start object in the hierarchy that are included in the evaluation path. This also applies to the creation of new objects and relationships.

Features

Creating Structures

You create the root object by entering an object type, abbreviation and name. From this root object, you can add subordinate objects and relationships to the structure. By entering an evaluation path, you specify the objects and relationships you wish to include in the structure.

Editing Structures

You can edit structures, which already exist, that is, you can delimit, move or delete objects from the structure as well as create new objects in the structure. You may also create, delimit and delete relationships. Via *Goto* → *Object Description* you can also maintain infotypes for individual objects.

If you want to create object or relationship, a dialog box appears, which displays the objects and relationships you may create. The system determines this selection based on the evaluation paths, which you entered.

You can display the evaluation path you have selected by choosing *Goto*. Icons indicate which relationships may be edited and which may only be displayed.

You can also select a new evaluation path.

Displaying Structures

By entering a start object and evaluation path, you specify which structures, that is, which objects and relationships you wish to display.

Matrix Organization

Matrix Organization

Definition

The matrix organization represents a two-dimensional hierarchy. This is based on positions reporting to more than one superior organizational object.

Use

Using the matrix organization tool, you can distribute limited resources across multiple organizational structures.



In a plant you may have a maintenance crew that is multi-talented, and thus not restricted to working in a specific work center. The pipe fitter in the crew reports to the manager of the work center where he fits pipes (functional reporting). He also reports to his own line manager (line reporting).

Structure

In a matrix organization, a vertical structure combines with a horizontal structure, that is two divisions overlap on the same hierarchical level. Here, the principles of functional reporting and line reporting intersect. The points of intersection represent positions which perform tasks for both the horizontal and vertical line.

Different variations on the horizontal and vertical systems result in different appearances of the matrix organization, for example:

- Project Matrix Organization
- Team Matrix Organization
- Product Matrix Organization
- Matrix in Connection with Legally Autonomous Units
- Matrix for Applicant Selection Procedure

Integration

Matrix organizations co-exist with hierarchical organizations. You use organizational objects to display different views within a matrix organization. You choose the views that are relevant to your business processes.

See also:

[Maintaining Matrix Organizations \[Page 131\]](#)

Maintaining Matrix Organizations

Use

Organizational structures, such as traditional organizational hierarchies, often focus too much on departmental objectives. This can sometimes be to the detriment of the objectives of the enterprise itself.

The matrix organization can solve this problem by assigning specific tasks for a specific purpose. It gives rise to units with different tasks that can make decisions to fulfill the tasks without, for example, having to turn to the management of the enterprise.

Features

Using the matrix tool, you can create different types of matrix organizations.

Project Matrix Organization

The objective of this organizational type is to use project groups to process new and fixed-term tasks for more than one area. Projects integrate employees from different areas within the enterprise for all, or part, of the time.

Unlike team work, project work describes alternating groups of employees who work together in special areas. The project employees do not have to originate from a single group of employees.

The employees of an organizational unit are subordinate to the line manager with regard to disciplinary matters, and to the project manager with regard to subject matter.

When **project reporting** is carried out, the most important question is who belongs to a project. An employee can belong in part to a project. His or her position does not, therefore, have to be assigned 100% to a project.

Team Matrix Organization

A team organization is used to carry out more complex projects at an enterprise. It includes several areas, and requires a wide range of specialized knowledge.

A team is characterized by far-reaching task orientation, and autonomy with regard to the methods used to fulfill the task.

Teams exist for a fixed term. When assigned to a team, employees are released from their staff and line tasks. Their competencies, tasks, and assignment within the organization are based purely on the requirements of the team.

Team work often constitutes a considerable part of a work group. Unlike project work, team work is characterized by a continuous exchange of information, being the main responsibility of each individual employee.

When **team reporting** is carried out, all employees and positions assigned to a team are evaluated. A position is assigned 100% to just one team. The employees can originate from different areas, so they are assigned to different organizational units.

Product Matrix Organization

Matrix organizations are often used in production environments, and enterprises that manufacture and distribute a variety of products.

Maintaining Matrix Organizations

An example of this type of matrix organization is a car manufacturer that is divided into the sales and distribution, financial accounting, and production departments. The company manufactures a variety of products, namely Model 1, Model 2, Model 3, and so on.

In a matrix organization, a Salesperson position reports to the Sales and Distribution department, and to the Model 1 group or department.

When **product reporting** is carried out, all of the Salesperson positions are evaluated, for example, that are assigned to Model 1, Model 2, Model 3, and so on.

Matrix in Connection with Legally Autonomous Units

These matrix organizations are not restricted to *Organizational Management* objects only. For example, organizational units such as the Executive Board, Sales and Distribution, and Development can be placed on the vertical level. At the same time, legally autonomous units such as SAP Holding, SAP Germany, and SAP USA can be placed on the horizontal level. Existing assignments between these dimensions are then highlighted at the points of intersection within the matrix, and the relationship period is displayed.



The **predefined matrix type** supplied by SAP is called **legal classification**. Its short form is **legal**. In the matrix view, the organizational units (object type O) are assigned in the vertical dimension, and the legally autonomous units (OR) are assigned in the horizontal dimension. The matrix relationship is: **organizational unit is assigned to (B 401)**.

Matrix for Applicant Selection Procedure

The following matrix organization can be used, for example, to simplify applicant selection. You can use a matrix in which:

- Applicant groups are created using applicants
- Appraisal teams are created using employees
- Applicant groups are assigned to appraisal teams

Activities

The *Simple Maintenance* function in *Organizational Management* enables you to process not only hierarchical, but also matrix and other complex organizational structures.

When you maintain a matrix, these are the activities you perform:

- Customizing matrix types
- Accessing matrix maintenance
- Matrix processing
 - Matrix view processing
 - Structure view processing
- Maintaining the structure

See also:

[Accessing Matrix Maintenance \[Page 134\]](#)

Accessing Matrix Maintenance

Accessing Matrix Maintenance

Use

You can perform matrix processing activities by accessing the *Simple Maintenance* function. On the *Organizational Management* screen, choose *Simple Maintenance* → *Matrix* → *Change* or *Display*. The *Access Matrix Organization* dialog box appears.

Activities

This screen enables you to access matrix maintenance in one of three ways:

- Choose a predefined matrix type
- Specify a matrix view as a variant
- Determine a matrix view using standard selection

If you use the first method, you choose the matrix type that you require from the predefined matrix types and then start matrix processing. You choose only the root object for all horizontal and vertical objects. The required relationship between the dimensions is predetermined by your choice of matrix type, as are the object types and the evaluation path of both dimensions.



You can choose standard matrix types or define them yourself in Customizing. If you define matrix types, you can use object types and objects that exist for this purpose. You can also set up new object types, objects, and relationships in Customizing.

If you use the second method, you specify the name of the matrix view with which you previously worked, and which you then saved as a variant. This determines the root object for all horizontal and vertical objects, as well as the required matrix relationship. This facilitates direct access of matrix processing. You might want to use a variant if, for example, you frequently work with the same matrix view.

If you use the third method, you can determine the required matrix view yourself. You access a selection screen in which you enter the required root object type, and the root object, for both dimensions, as well as the relationship between the dimensions. You can also specify an evaluation path for each dimension, which enables you to determine the objects that can be displayed in the matrix and hierarchy view.

See also:

[Customizing Matrix Types \[Page 140\]](#)

[Matrix Processing \[Page 135\]](#)

Matrix Processing

Use

Matrix processing enables you to maintain the matrix assignments. These are the relationships required between the objects of dimension 1, and the objects of dimension 2.

You can process the matrix in the:

- Matrix view
- Structure view

Here, dimensions are displayed in a tree structure.

Prerequisites

To process a matrix, the following must be done:

- The types of organizational object that can be combined in matrix processing must be determined. To do this, define the matrix type in Customizing. You cannot define the matrix type until you have defined the object types, which you also do in Customizing.
- The type of relationship required between the object type of dimension 1, and the object type of dimension 2, must be specified. The relationship type is specified automatically by choosing the matrix type, or by you specifying the one you require on the standard selection screen.
- The root object must be specified for all horizontal and vertical objects. If no root object is specified, all objects of the object type are selected.



1. By specifying an evaluation path for the horizontal and vertical dimension, you also determine the objects that can be displayed in the matrix and hierarchy view.
2. Within the hierarchy view, you can display the evaluation path by choosing *Goto → Display evaluation path*. The *Display Evaluation Path* dialog box contains indicators that show whether a matrix relationship can be maintained (pencil) or displayed (glasses).

See also:

[Matrix View Processing \[Page 136\]](#)

[View Options in Matrix View Processing \[Page 137\]](#)

[Structure View Processing \[Page 138\]](#)

[View Options in Structure View Processing \[Page 139\]](#)

Matrix View Processing

Matrix View Processing

Use

In the matrix view, the relationships that you set up between the two dimensions are highlighted within the matrix at the points of intersection. Relationship and delimitation dates are also displayed for further information.

Activities

Starting from the *Access Matrix* screen, you can access the *Matrix View / Change* or *Display screen* by choosing one of the three buttons, on this screen you can edit the matrix in the following ways:

Maintaining Matrix Assignments

On the *Matrix View / Change* screen, you maintain matrix assignments by choosing one of the points where the two lines meet and choosing *Matrix assignment* → *Create* or *Delete* or *Delete* or via *Create*, *Delimit* or *Delete*. You can perform the following maintenance activities:

- Create matrix assignments
- Delimit matrix assignments
- Delete matrix assignments



The validity period specified on the *Access Matrix* screen is also used as the selection period for the assignment. This period is also the default on the *Matrix View/Change* screen when you create an assignment.

Printing the Matrix View Screen

To print out the matrix view screen, choose *Matrix assignment* → *Print*. To display the assignment period in the printing screen, choose *View* → *Relationship period on*.

See also:

[View Options in Matrix View Processing \[Page 137\]](#)

[Structure View Processing \[Page 138\]](#)

View Options in the Matrix View

Selecting view options

To:	Choose:
Invert dimensions	<i>View → Invert dimensions, or Invert dimensions</i>
Update the structure	<i>Edit → Update, or Update</i>
Change the view	<i>View → Structure → Dimension 1 or Dimension 2,</i>



If you choose *Structure*, the system defaults to the *Structure Dimension 1: Change* screen. Once you have accessed the *Structure Dimension 1: Change* screen, you can also view structure dimension 2 by choosing *Invert dimension*.

See also:

[Matrix View Processing \[Page 136\]](#)

Structure View Processing

Use

You can use the hierarchy view to display the structure of a dimension in a tree structure (together with its objects), the relationships to the second dimension, and the entire structure of the second dimension.

You can also use the structure view, as well as the matrix view, to maintain matrix assignment.

Activities

On the *Access Matrix* screen, choose one of the following screens, which enable you to perform a number of matrix processing activities in the structure view:

- *Structure Dimension 1:*
- *Structure Dimension 2*

Maintaining Matrix Assignments

You maintain matrix assignments by choosing the name of an object and performing the following maintenance activities by choosing *Matrix assignment* → *Create* or *Delimit* or *Delete* or via *Create*, *Delimit* or *Delete*:

- Create matrix assignments
- Delimit matrix assignments
- Delete matrix assignments



To display the change within your structure, choose *Edit* → *Update*, or alternatively, choose *Update* directly.

See also:

[View Options in Structure View Processing \[Page 139\]](#)

[Matrix View Processing \[Page 136\]](#)

View Options in Structure View Processing

Selecting View Options

To:	Select:
Invert dimensions (Display and edit the tree structure, starting with the root object of the other dimension and all of its underlying objects)	<i>View → Invert dimensions, or Invert dimensions</i>
Expand and compress the tree structure	<i>Expand or Compress</i>
Change the view	<i>View → Matrix view, or Matrix view.</i>

See also:

[Structure View Processing \[Page 138\]](#)

Customizing Matrix Types

Customizing Matrix Types

Use

The matrix types must be defined before you can access matrix processing by choosing matrix types. You must use Customizing to determine the types of objects within the system that can be combined.

You can assign object types from *Organizational Management*, such as organizational units and positions, as well as external objects, such as plants and customers.

Prerequisites

To use Customizing to determine matrix types, you must first use Customizing to create object types, objects, and relationships between object types.

The matrix type definition determines the sequence of object types within the matrix, which entails a kind of preselection of the possible views. You determine the:

- Objects that are displayed horizontally within the matrix view
- Objects that are displayed vertically in the matrix view
- Type of assignment that can be maintained between these objects

Evaluation Paths

An evaluation path describes a chain of relationships between objects in a hierarchical structure. The O-S-P evaluation path, for example, describes the *organizational unit - position - person* relationship chain. The system evaluates the structure of your organizational plan along this evaluation path.

Customizing enables you to specify an evaluation path for each dimension, and to determine the structure that can be displayed within the matrix and hierarchy view.

See also:

[Accessing Matrix Maintenance \[Page 134\]](#)

Maintaining the Structure

Use

You can maintain objects within the structure of your two dimensions, without accessing the matrix and hierarchy view. This can be necessary, for example, to take account of structural changes in the dimensions of your matrix organization.

Activities

Starting from the matrix view or hierarchy view, you can access the *Dimension 1: Change*, or *Dimension 2: Change*, screens by choosing *Goto → Dimension maintenance → Dimension 1*, or *Dimension 2*.



You can only set up matrix assignments in the matrix or hierarchy view.

The *Edit* menu option and functions in the standard toolbar enable you to:

1. Create objects
 - Delimit objects
 - Move objects
 - Delete objects
2. Create relationships
 - Delimit relationships
 - Delete relationships



You can only maintain the objects and relationships that are included in the evaluation path you specified for a dimension. If you do not specify an evaluation path, you can only create individual root objects.

See also:

[Matrix Processing \[Page 135\]](#)

Reports in Organizational Management

Use

The *Organizational Management* component offers numerous reports, with which you can access data on your most important questions concerning the organizational plan.

Features

When you access a report, a screen containing **selection parameters** appears. As well as report-specific parameters, additional selection fields are provided:

- **<Object type>** (depending on report: organizational unit, job, position, work center or task)
You can specify the object with which you want to start the report.
- **Search Term**
You can search for an object.
- **Status**
You can specify that only objects with a certain status can be reported on.
- **Reporting Period / Reporting Key Date**
Depending on the report, there are various criteria for determining a key date or a reporting period.

You can switch to the **standard selection screen** in many reports that you access via the SAP menu. This offers additional selection parameters.

Standard Selection Screen

- **Plan Version**
You can specify the plan version for which you want to start a report.
- **Object Type**
You can specify the object type for which you want to start a report.
- **Object ID**
You can specify the object with which you want to start a report.
- **Object Status**
You can specify that only objects with a certain status can be reported on.
- **Data Status**
You can specify that only data with a certain status can be reported on.
- **Set Structure Conditions**
You can set various structure conditions.
- **Evaluation Path**
Via the evaluation path, you can specify the objects in a structure that are to be reported on.

Reports in Organizational Management

- **Status Vector**

You can specify that only objects whose relationship infotypes (assignments) have a certain status can be reported on.

- **Status Overlap**

You can execute a simulation that displays the results as though all relationship infotypes were active.

- **Display Depth**

You can specify the level of a structure to which the report is to be executed.

Existing Organizational Units (Report RHXEXI00)

Existing Organizational Units (Report RHXEXI00)

Use

This report provides an overview of all existing organizational units.

Integration

This report is also accessed by other reports and transactions.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all organizational units, with information on

- validity period
- status
- name
- object ID

Staff Functions for Organizational Units (Report RHXSTAB0)

Use

This report displays all organizational units and their staff functions.

Prerequisites

So that you can report on organizational units with staff functions, you must have flagged them with the staff indicator.

- Select the *Staff* field for the organizational unit in the *Organization and Staffing* view. For more information, see [Basic Data \(Organizational Unit\) \[Page 67\]](#).
- Create a record for infotype 1003 for the organizational unit in *Expert Mode*. For more information, see [Department/Staff \(Infotype 1003\) \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all organizational units and their staff functions, with information on

- status
- validity

Activities

Once the report is started, the number of objects found is displayed. To display individual objects, choose *Organizational Unit* by double-clicking on it.

Organizational Structure with Persons (Report RHXSTR02)

Use

This report displays the persons who belong to each organizational unit.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the organizational structure and the persons who belong to it. The hierarchy levels are shown by corresponding indentations in the tree structure.

Organizational Structure with Work Centers (Report RHXSTR02)

Use

This report displays the work centers which belong to each organizational unit.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the organizational structure and the work centers which belong to it. The hierarchy levels are shown by corresponding indentations in the tree structure.

Existing Jobs (Report RHXEXI02)

Existing Jobs (Report RHXEXI02)

Use

This report provides an overview of all existing jobs.

Integration

This report is also accessed by other reports and transactions.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all jobs, with information on

- validity period
- status
- name
- object ID

Job Index (Report RHSTEL00)

Use

This report enables you to display all existing jobs.

Features

Selection

In addition to the [general selection parameters \[Page 142\]](#), the following selection parameters are available:

- **Directly assigned persons**

You can specify whether you want to display the persons directly assigned to the jobs.

Output

The list contains all jobs, with information on

- the positions assigned to them
- the holders of the positions assigned
- staffing percentage of the assigned positions

Job Description (Report RHXDESC0)

Job Description (Report RHXDESC0)

Use

This report lists all jobs and their job descriptions.

Integration

This is a preliminary report for general report *Object description* (RHDESC20).

The [complete job description \[Page 151\]](#) report provides a complete job description.

Prerequisites

So that you can report on job descriptions, you must have created descriptions for jobs.

- You can create a description in the *Organization and Staffing* view. For more information, see [Basic Data \(Job\) \[Page 84\]](#).
- Create a record for infotype 1002 for the job in *Expert Mode*. For more information, see [Description \(Infotype 1002\) \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all jobs, with information on

- name
- validity
- description

Activities

Use the buttons ◀ and ▶ to navigate through the list.

Complete Job Description (Report RHXSCRPO)

Use

This reports lists all jobs along with specifications on their description, requirements profile, task profile and resources and authorities.

Prerequisites

So that you can report on descriptions, you must have created descriptions for jobs.

- You can create a description in the *Organization and Staffing* view. For more information, see [Basic Data \(Job\) \[Page 84\]](#).
- Create a record for infotype 1002 for the job in *Expert Mode*. For more information, see [Authorities/Resources \(Infotype 1010\) \[Ext.\]](#).

To report on authorities and resources, you must have maintained a record for infotype infotype 1010. For more information, see [Description \(Infotype 1002\) \[Ext.\]](#).

You can only report on the requirements profile for jobs if the *Personnel Development* component is installed.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all jobs, with information on

- name
- description
- authorities and resources
- requirements profile
- task profile

Activities

Use the buttons  and  to navigate through the list.

Periods for Unoccupied Positions (Report RHFILLPOS)

Periods for Unoccupied Positions (Report RHFILLPOS)

Use

This report displays the periods in which assigned positions are unoccupied per organizational unit.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).



Use the evaluation path SBESX if you want to report on all the positions in an organizational structure. The system starts the report for the organizational unit you enter and reports accordingly on all the organizational units below it.

If you are, however, using the evaluation path SBES, only the positions belonging to the organizational unit you have entered are reported on.

Output

The list contains all relevant positions by organizational unit, with information on

- the period for which the position is unoccupied
- new holder
- number of unoccupied days
- average of unoccupied days per organizational unit

Existing Positions (Report RHXEXI03)

Use

This report provides an overview of all existing positions.

Integration

This report is also accessed by other reports and transactions.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all positions, with information on

- validity period
- status
- name
- object ID

Staff Assignments (Report RHSBES00)

Staff Assignments (Report RHSBES00)

Use

This report enables you to display the staff assignments (positions and persons) for one or more organizational units.

Features

Selection

In addition to the [general selection parameters \[Page 142\]](#), the following selection criteria are available:

- **Organizational unit**
You enter the organizational unit for which you want to start the report.
- **Status**
You can specify whether active, planned, submitted, approved or rejected objects are to be displayed.
- **Report on Organizational Structure**
You can specify whether only the selected organizational unit is to be reported on, or whether all the organizational units assigned to it are to be taken into account as well.
- **Basis for Working Time**
You can display working times in hours per day, per week, per month or per year.
- **Display Holders Only**
You can either display the position holders or the holders and their substitutes.
- **Persons without Positions**
You can also display persons who are not assigned a position.

Output

The list contains all positions by organizational unit, with information on

- the persons assigned to the positions
- chief positions
- staffing status
- actual working times
- planned working times
- staffing percentages
- assignment to employee groups
- assignment to employee subgroups

Position Description (Report RHXDESC1)

Position Description (Report RHXDESC1)

Use

This report lists all positions and their position descriptions.

Integration

This is a preliminary report for general report *Object description* (RHDESC20).

The [complete position description \[Page 162\]](#) report provides a complete position description.

Prerequisites

So that you can report on position descriptions, you must have created descriptions for positions.

- You can create a description in the *Organization and Staffing* view. For more information, see [Basic Data \(Position\) \[Page 92\]](#).
- Create a record for infotype 1002 for the position in *Expert Mode*. For more information, see [Description \(Infotype 1002\) \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all positions, with information on

- name
- validity
- description

Activities

Use the buttons ◀ and ▶ to navigate through the list.

Staff Functions for Positions (Report RHXSTAB1)

Use

This report displays all positions and their staff functions.

Prerequisites

So that you can report on positions with staff functions, you must have flagged them with the staff indicator.

- Select the Staff field for the position in the *Organization and Staffing* view. For more information, see [Basic Data \(Position\) \[Page 92\]](#).
- Create a record for infotype 1003 for the position in *Expert Mode*. For more information, see [Department/Staff \(Infotype 1003\) \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all positions and their staff functions, with information on

- status
- validity

Activities

Once the report is started, the number of objects found is displayed. To display individual objects, choose *Position* by double-clicking on it.

Authorities and Resources (Report RHXHFMT0)

Authorities and Resources (Report RHXHFMT0)

Use

This report lists all positions or work centers with the resources and authorities entered for them.

Prerequisites

To report on authorities and resources, you must have maintained the subtypes of infotype 1010 for positions/work centers in *Expert Mode*. For more information, see [Authorities/Resources \(Infotype 1010\) \[Ext.\]](#).

Features

Selection

In addition to the [general selection parameters \[Page 142\]](#), the following selection parameters are available:

- **Authorities/Resources**

You can choose between the two subtypes of infotype 1010, *Authorities/Powers of Attorney* and *Technical Resources*.

Output

The list contains all positions or work centers, with information on

- name
- status
- authorities and resources

Planned Labor Costs (Report RHSOLO00/RHXSOLO00)

Use

This report enables you to determine the planned labor costs per position or work center for one or more organizational units.

Prerequisites

The [Planned Remuneration \(1005\) \[Ext.\]](#) infotype is valid for the positions/work centers belonging to the organizational unit concerned or for the relevant jobs.

Features

Selection

In addition to the [general selection parameters \[Page 142\]](#), the following selection parameters are available:

- **Currency**
You can select the currency in which you want the data to be displayed.
- **Conversion type It. TCURR**
You can enter an exchange rate type.
- **Values**
You can decide how the planned remuneration band widths are to be set up.
- **Periods**
You can specify the unit of time that is to be used to calculate or display the amount in compensation administration.

Output

The list contains all positions or work centers per organizational unit, with information on

- amount
- currency

Vacant Positions (Report RHVOPOS0)

Vacant Positions (Report RHVOPOS0)

Use

This report enables you to display all positions that are flagged as vacant. A vacant position is a position that has no holder during a particular period and is flagged as vacant.

Prerequisites

So that you can report on vacant positions, you must have flagged them as vacant:

- Flag a position as *Vacancy open* in the *Organization and Staffing* view. For more information, see [Position \[Page 20\]](#).
- Create a record for infotype 1007 for the position in *Expert Mode*. For more information, see [Vacancy \(Infotype 1007\) \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all vacant positions by organizational unit, with information on

- period of vacancy
- staffing status

Obsolete Positions (Report RHVOPOS1)

Use

This report enables you to display all positions that are flagged as obsolete. An obsolete position is a position that is removed at a particular time.

Prerequisites

So that you can report on obsolete positions, you must have flagged them as obsolete:

- Flag a position as *obsolete* in the *Organization and Staffing* view. For more information, see [Position \[Page 20\]](#).
- Create a record for infotype 1014 for the position in *Expert Mode*. For more information, see [Obsolete \(Infotype 1014\) \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all obsolete positions by organizational unit, with information on

- the period in which the position is obsolete
- staffing status

Complete Position Description (Report RHXSCR1)

Complete Position Description (Report RHXSCR1)

Use

This report lists all positions and the numerous characteristics which describe them.

Prerequisites

So that you can report on these characteristics, the relevant infotypes must be maintained and the corresponding relationships available.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all positions, with information on

- description
- staffing (holder of a position)
- superior and subordinate positions
- activity profile of the position
- requirements profile (only if the *Personnel Development* component is installed)
- describing job
- activity profile of the job
- requirements profile of the job (only if the Qualifications/Requirements component is installed)
- work center assigned to the position
- integration of the position in the organization

Using the object description function, you can display further information, such as Resources/Authorities etc.

Activities

Use the buttons ▼ and ▲ to navigate through the list.

You can edit infotypes by choosing *Goto → Object description*.

Reporting Structure without Persons (Report RHSTR05)

Reporting Structure without Persons (Report RHSTR05)

Use

This report lists the subordinate positions for each position selected.

Integration

Report RHDTRU04 enables you to display a [Reporting Structure with Persons \[Page 165\]](#).

Prerequisites

To report on a reporting structure, you must have created a reporting structure. To do this, you must subordinate positions to one another:

- You can create a hierarchy in the *Organization and Staffing* view. For more information, see [Hierarchy \(Position\) \[Ext.\]](#).
- You can create a reporting structure in *Expert Mode*. For more information, see [Reporting Structures \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the subordination and superordination of positions. The hierarchy levels are shown by corresponding indentations in the tree structure.

Reporting Structure with Persons (Report RHSTR04)

Use

This report lists the subordinate positions for each position selected. All position holders are also displayed.

Integration

Report RHDTRU05 enables you to display a [Reporting Structure without Persons \(Report\) \[Page 164\]](#).

Prerequisites

To report on a reporting structure, you must have created a reporting structure. To do this, you must subordinate positions to one another:

- You can create a hierarchy in the *Organization and Staffing* view. For more information, see [Hierarchy \(Position\) \[Ext.\]](#).
- You can create a reporting structure in *Expert Mode*. For more information, see [Reporting Structures \[Ext.\]](#).

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the subordination and superordination of positions as well as the assignment of persons to positions. The hierarchy levels are shown by corresponding indentations in the tree structure.

Existing Work Centers (Report RHXEXI05)

Existing Work Centers (Report RHXEXI05)

Use

This report provides an overview of all existing work centers.

Integration

This report is also accessed by other reports and transactions.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all work centers, with information on

- validity period
- status
- name
- object ID

Work Centers per Organizational Unit (Report RHXSTRU06)

Use

This report lists the work centers assigned to each organizational unit.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the assignment of work centers to organizational units. The hierarchy levels are shown by corresponding indentations in the tree structure.

Existing Tasks (Report RHXEXI04)

Existing Tasks (Report RHXEXI04)

Use

This report provides an overview of all existing tasks.

Integration

This report is also accessed by other reports and transactions.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all tasks, with information on

- validity period
- status
- name
- object ID

Activity Profile of Positions (Report RHXSTR07)

Use

This report displays the positions belonging to an organizational unit, as well as the directly or indirectly (via job) assigned tasks and the assigned persons.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the assignment of tasks and persons to positions. The hierarchy levels are shown by corresponding indentations in the tree structure.

Activity Profile of Positions with Persons (Report RHXSTR08)

Activity Profile of Positions with Persons (Report RHXSTR08)

Use

This report displays the positions belonging to an organizational unit, as well as the directly or indirectly (via job) assigned tasks.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the assignment of tasks to positions. The hierarchy levels are shown by corresponding indentations in the tree structure.

Existing Objects (Report RHEXIST0)

Use

This report provides an overview of all existing objects.

Integration

This report is also accessed by other reports and transactions.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

The list contains all objects, with information on

- validity period
- status
- name
- object ID

Structure Display/Maintenance (RHSTRU00)

Structure Display/Maintenance (RHSTRU00)

Use

This report displays a section of the organizational plan according to the initial object and evaluation path entered.

Prerequisites

The evaluation path you enter must appear in table T778A.

Features

Selection

For more information on the selection parameters, see [Reports in Organizational Management \[Page 142\]](#).

Output

A structure tree appears, which displays the assignment of organizational objects to one another. The hierarchy levels are shown by corresponding indentations in the tree structure.

Reporting on an Infotype (Report RHINFAW0)

Use

This report enables you to report on any infotype. This can be executed structurally or sequentially (in other words, along a structure using an evaluation path according to table T77AW/T778A). The report can also be used for infotypes that you have created yourself.

Features

Selection

In addition to the [general selection parameters \[Page 142\]](#), the following selection parameters are available:

- **Infotype**
You can specify the infotype that you wish to report on.
- **Subtype**
You can specify the subtype that you wish to report on.
- **Reporting on an Infotype Field**
You can specify the field entries of the infotype records that are to be displayed.
- **Selecting an Infotype Field**
You can select the fields, whose entries you wish to display.
- **All Objects**
You can specify that the objects for which there is no record for the infotype be displayed as well.
- **Objects without this Infotype**
You can specify that only those objects for which there is no record for the infotype be displayed.

Starting an HR Report (Report RHPNPSUB)

Starting an HR Report (Report RHPNPSUB)

Use

Using this program, you can start various reports for a number of personnel numbers. The reports will draw on information from the structures in the organizational plan.

Features

Selection

The following selection parameters are available in addition to the [general selection parameters \[Page 142\]](#):

- **HR Reporting**
Enter the name of the report you want to start.
- **Report Variants**
You can select a report variant.
- **Enhanced HR Selection**
You can use additional selection parameters.
- **Sort by Personnel Number**
Sorting is possible.

Output

The output depends on the report you select.