

OM Review Webinar





Purpose

- Org Structure in SAP vs. PMIS
- Relationships for positions and org units
 - Independent of each other.
 - Viewable with:
 - PO13 (or PO13D)*
 - PPOSE*



Purpose (cont.)

- *What relationships can change when performing Position Transfer and Change Supervisor of Position actions.*
- *When BEST must be contacted to make certain relationship changes.*
- *When BEST can be utilized to assist in organizational changes as a time saver.*



Org Structure in SAP vs. PMIS

- PMIS was a bit more simple than SAP.
- In PMIS there was only one relationship to be concerned with – Position to Position
- SAP has added Org Units which are useful for organizing reports.



OM Relationships in SAP

- The four most important relationships are:
 - 'P to S' – Defines which position an employee holds.
 - 'S to S' – Defines to which position a position reports.
 - 'S to O' – Defines to which org unit a position belongs.
 - 'O to O' – Defines to which org unit an org unit reports.

P – Employee

S – Position

O – Org Unit

- These relationships are independent of one another and making a change to one does not change the others.
- Additionally, positions can Manage org units. (Employees do not manage org units, they hold the positions which do.)



Viewing Relationships with PO13 (or PO13D)

- PO13 shows 3 of the 4 most important relationships.
 - P to S ('Holder')
 - S to S ('Reports' and conversely 'Is Line Su')
 - S to O ('Belongs to')
- PO13 also shows the 'Manages' relationship
- The history of these relationships is easily seen on one screen.



PO13 Main Screen

Position Edit Goto Utilities(M) Settings System Help

SAP

Maintain Position

Plan version: Current plan
Position: 65002439 Contracts Administrator
Abbr.: 800904000070

Active Planned Submitted Approved Rejected

Infotype Name	E	...
Object	✓	...
Relationships	✓	...
Description		...
Department/Staff		...
Planned Compensation		...
Vacancy	✓	...
Acct. Assignment Features	✓	...
Authorities/Resources		...
Full Time Equivalent		...
Employee Group/Subgroup	✓	...

Time period

Period
From 01/01/1800 to 12/31/9999

Today
 All
 From curr.date
 To current date

Current week
 Current month
 Last week
 Last month
 Current Year

Select.

PO13 be1ta01z INS

Show how 'All' is selected. Show how Relationships is selected. Show the overview button.



PO13 Relationships Screen

Position: 800904000070 Contracts Administrator
Planning Status: Active
Relationships: 01 S 65002439 1

Start	End	R	Rela.	Relat. text	R	Rel'd objec.	Abbr.	% Rate
07/01/2009	12/31/9999	A	002	Reports to	S	60083606	206000002564	0.00
07/01/2007	06/30/2009	A	002	Reports to	S	60035949	000000050015	0.00
07/01/2009	12/31/9999	A	003	Belongs to	O	20010226	48020602564	0.00
07/01/2007	06/30/2009	A	003	Belongs to	O	20003893	435040000000	0.00
01/01/2008	12/31/9999	A	008	Holder	P	80000031	Hutchins	100.00
07/01/2007	12/31/9999	B	007	Is describ	C	50000804	Adm Ofr	0.00

Entry 1 of 6

Record created PO13 be1ta01z INS

This chart shows the current settings as well as the history of the 'P' to 'S', the 'S' to 'S' and the 'S' to 'O' relationships. The relationships with a 12/31/9999 end date is the current setting.

PO13 Relationships Screen for the Supervisor Position



Infotype Edit Goto View System Help **SAP**

List display with change Relationships

Position 206000002564 Historic Sites Specialist II
 Planning Status Active
 Relationships 01 S 60083606 1

Here is the 'Manages' relationship.

Start	End	R	Rela	Relat.text	R	Rel'd objec	Abbr.	% Rate
07/01/2007	12/31/9999	A	002	Reports (I	S	60083406	204010002300	0.00
07/01/2007	12/31/9999	A	003	Belongs to	O	20010226	48020602564	0.00
01/01/2008	12/31/9999	A	008	Holder	P	80001036	Leach	100.00
07/01/2009	12/31/9999	A	012	Manages.	O	20010226	48020602564	0.00
07/01/2009	12/31/9999	B	002	Is line su	S	65002439	800904000070	0.00
07/01/2007	12/31/9999	B	002	Is line su	S	60095748	204010000480	0.00
07/01/2007	12/31/9999	B	002	Is line su	S	60095747	204010000479	0.00
07/01/2007	12/31/9999	B	002	Is line su	S	60095746	204010000478	0.00
07/01/2007	12/31/9999	B	002	Is line su	S	60095745	204010000477	0.00
07/01/2007	12/31/9999	B	002	Is line su	S	60083611	206000002586	0.00
07/01/2007	12/31/9999	B	002	Is line su	S	60083610	206000002574	0.00

These are the positions being supervised. S to S.

Entry 1 of 19

PO13 be1ta01z INS

This slide shows the relationships for the supervisory position of the previous slide. The reciprocal of the 'Reports' relationship is the 'Is line su' relationship. This slide also shows the Manages relationship and in this case it 'Manages' the same org unit as it 'Belongs to.'

PO13 Relationships Screen for the Supervisor Position - **INCORRECT**



Infotype Edit Goto View System Help **SAP**

List display with change Relationships

Position: 206000002565 Historic Interpreter III
 Planning Status: Active
 Relationships: 01 S 60083607 1

Start	End	R	Rela	Relat.text	R	Rel'd objec	Abbr	% Rate
07/01/2007	12/31/9999	A	002	Reports (l	S	60083606	206000002564	0.00
07/01/2007	12/31/9999	A	003	Belongs to	O	20010226	48020602564	0.00
01/01/2008	12/31/9999	A	008	Holder	P	80001037	Santiago	100.00
07/01/2009	12/31/9999	A	012	Manages...	O	20010177	48020402335	0.00
03/15/2008	12/31/9999	B	007	Is describ	AG	ZESS-TIME_UZESS-TIME_US		0.00
07/01/2007	12/31/9999	B	007	Is describ	C	30001535	His Inter	0.00

Entry 1 of 6

PO13 be1ta01z INS

Notice that this position Manages a different org unit than it Belongs to. SAP does allow this discrepancy, but ultimately this is a BEACON error. A position should always Belong to the same org unit which it Manages.



PO13 Review

- PO13 is an easy way to see the history of a position's relationships as they are all viewable on the screen at one time.
- A supervisory position with a 'Manages' relationship should belong to the same org unit which it 'Manages.'
- The current relationship is the one with a 12/31/9999 end date.



Viewing Relationships with PPOSE

- PPOSE is useful for viewing the skeleton of the org structure.
- PPOSE shows 3 of the 4 most important relationships.
 - P to S ('Holder')
 - S to O ('Incorporates' (was 'Belongs To' in PO13))
 - **O to O ('Is Line Supervisor of')**
- PPOSE **DOES NOT** show S to S! (Position to Position)
- PPOSE shows the Object Abbr field which is needed when creating new org units.
- PPOSE shows the Chief/Manages relationships



PPOSE Relationships

Organization and Staffing Edit Goto Settings System Help

Organization and Staffing Display

07/15/2009 + 3 Months

The Code column shows the Obj Abbr. field for Org Units and Positions.

A position with a triangle beside it indicates that it is occupied.

No triangle indicates that the position is vacant.

Incorporates = S to O

Holder = P to S

Incorporates = S to O

Is line Supervisor of = O to O

Staff Assignments (Structure)	Code	ID	Relationship text	Chief	Workflow
CR CDS A&H HIS SITES	48020602564	O 20010226		Jean Leach	
Museum Specialist	206000002563	S 60083605	Incorporates		
Historic Sites Special	206000002564	S 60083606	Incorporates		
Jean Leach	Leach	P 80001036	Holder		
Historic Interpreter I	206000002565	S 60083607	Incorporates		
Ervin Santiago	Santiago	P 80001037	Holder		
Office Assistant IV	206000002566	S 60083608	Incorporates		
Museum Specialist	206000002567	S 60083609	Incorporates		
Public Information As	206000002574	S 60083610	Incorporates		
Museum Specialist	206000002586	S 60083611	Incorporates		
Historic Interpreter I	204010000477	S 60095745	Incorporates		
Historic Interpreter I	204010000478	S 60095746	Incorporates		
Historic Interpreter I	204010000479	S 60095747	Incorporates		
Historic Interpreter I	204010000480	S 60095748	Incorporates		
Contracts Administra	800904000070	S 65002439	Incorporates		
Henry Hutchins	Hutchins	P 80000031	Holder		
CR CDS A&H HIS SIT	48020402335	O 20010177	Is line supervisor of	Ervin Santiago	
Historic Site Manu	204020002335	S 60083432	Incorporates		
Historic Site Assis	204020002338	S 60083433	Incorporates		
Historic Interpreter	204010000400	S 60095534	Incorporates		
Historic Interpreter	204010000401	S 60095676	Incorporates		

Details for Organizational unit CR CDS A&H HIS SITES OR St Cap

PPOSE | be1ta01z | INS

This slide shows that we can see the 'S to O', the 'P to S' and the 'O to O' relationships. The Code column shows the Obj. Abbr. field for org units and is a good way to help determine the value for any new org units requested.



Chief Column in PPOSE

Organization and Staffing Display

07/15/2009 + 3 Months

Staff Assignments (Structure)	Code	ID	Relationship text	Chief
CR_CDS A&H HIS SITES	48020602564	O_20010226		Jean Leach
Museum Specialist	206000002563	S_60083605	Incorporates	
Historic Sites Special	206000002564	S_60083606	Incorporates	
Jean Leach	Leach	P_80001036	Holder	
Historic Interpreter I	206000002565	S_60083607	Incorporates	
Ervin Santiago	Santiago	P_80001037	Holder	
Office Assistant IV	206000002566	S_60083608	Incorporates	
Museum Specialist	206000002567	S_60083609	Incorporates	
Public Information As	206000002574	S_60083610	Incorporates	
Museum Specialist	206000002586	S_60083611	Incorporates	
Historic Interpreter I	204010000477	S_60095745	Incorporates	
Historic Interpreter I	204010000478	S_60095746	Incorporates	
Historic Interpreter I	204010000479	S_60095747	Incorporates	
Historic Interpreter I	204010000480	S_60095748	Incorporates	
Contracts Administra	600994000070	S_65002439	Incorporates	
Henry Hutchins	Hutchins	P_80000031	Holder	
CR_CDS A&H HIS SIT	48020402335	O_20010177	Is line supervisor of	Ervin Santiago
Historic Site Manu	204020002335	S_60083432	Incorporates	
Historic Site Assis	204020002338	S_60083433	Incorporates	
Historic Interpret	204010000400	S_60095534	Incorporates	
Historic Interpret	204010000401	S_60095676	Incorporates	

When an org unit has two positions with chief hats, that is indicative of a problem!

Chief column displays the holder of the position that manages the org unit. Employees do not manage org units, positions do.

You can see here that Santiago's position is the Chief of Org Unit 20010177, but that the position actually belongs to org unit 20010226. This indicates an incorrect set of relationships!

Details for Organizational unit CR_CDS A&H HIS SITES OR St Cap

PPOSE | be1ta01z | INS

Notice that the value in the Chief column does not necessarily indicate that that position is in that org unit. It instead displays the 'Holder' of the position that owns the Manages relationship for that org unit.



To Reiterate:

PPOSE **DOES NOT** show S to S relationships! Instead, you are able to see:

- *to which org unit a position belongs (S to O)*
- *if a position is occupied (P to S)*
- *if a position has a Manages relationship*

PPOSE is **the only** way to see O to O relationships (other than Org Plus)

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You can also see O to O relationships with PPOSE.

OM PCRs – What relationships are changed?



- There are 2 actions used to change positional relationships
 - Position Transfer (113)
 - Change Supervisor of Position (124)
- What is the difference between these two actions?

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With regards to Org Structure, 113 and 124 actions are the two that affect a position's relationships. There is one major difference in what these two actions can do.

OM PCRs – Change Supervisor of Position



Change Supervisor of Position - CREATE

Initiate Work Flow

Position Header

Position	60091134	Information Processing Technician	Org Unit	20010652
PCR Number			Reports To	60087179
Valid from	07/23/2009	to 12/31/9999	Supervisor	
Holder		Douglas R Genzinger	WF Status	<input type="checkbox"/>
Personnel area	1401	State Controller		

	Current Value	New Value
Reports to Position	60087179	<input type="text" value="←"/>
Reports to Position Text	Core Hr. Lead	<input type="text"/>
Reports to Person		<input type="text"/>
Reports to Person Text	Julia B Parsons New	<input type="text"/>

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On a Change Supervisor of Position action, there is only 1 value which can be changed:
Reports to

A 124 action can only change the S to S relationship.

OM PCRs – Position Transfer



Position Transfer - CREATE

Initiate Work Flow

Position Header

Position	60091134	Information Processing Technician	Org Unit	2001052
PCR Number			Reports To	
Valid from	07/23/2009	to 12/31/9999	Supervisor	
Holder	01669685	Douglas R. Genzinger	WF Status	
Personnel area	1401	State Controller		

Current Values		New Values
Org Unit	20010652 OSC BEACON BEST SHARED SVC	<input type="text" value="2001052"/>
Reports to	60087179 Core Hr Lead	<input type="checkbox"/>
Personnel Area	1401 State Controller	<input type="checkbox"/>
Personnel Subarea	NC01 7day Norm	<input type="checkbox"/>
EE Group	A SPA Employees	<input type="checkbox"/>
EE Subgroup	B1 FT S-FLSAOT Perm	<input type="checkbox"/>
County	092 Wake	<input type="checkbox"/>

Address Time

In a Position Transfer action there are 7 fields which can be given New Values. In regards to Org Structure the two that concern us are:

- Org Unit
- Reports to

Both the 113 and 124 action can change the S to S relationship. But only the 113 action can change the 'S to O' relationship.

OM PCRs – What relationships are changed?



- Therefore, if a position needs only to have its supervisory relationship changed, then the appropriate action is a 124.
 - Example: The current supervisory position of an org unit has been transferred into a new unit. All of the positions in the original unit need to now report to the newly designated supervisor position that already exists within the same unit.
- If however it needs to also change org units, or only to change org units, then you must use a 113 action.
 - Example: A position is moving from one division to another within the agency and will report to a new supervisory position.

OM PCRs – What relationships are changed?



So in other words...

- A Change Supervisor of Position (124) action can only change the S to S relationship.
- A Position Transfer (113) action can change the S to S as well as the S to O relationship.



Org Structure and ESS/MSS

- Positions with MSS access can approve time sheets and leave requests for their subordinate positions.
- What relationship drives the population of subordinate positions in MSS?
- **S to S!** And only S to S!



Org Structure and ESS/MSS

If the holder of a managerial position (with MSS access) cannot see an employee they believe they should be able to...

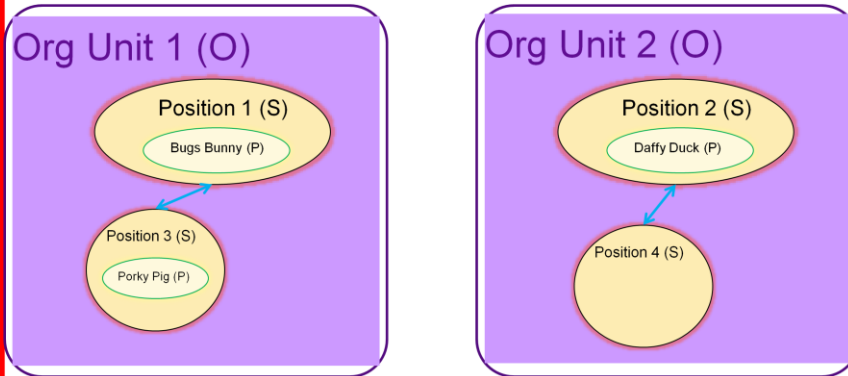
- First check to see that the managerial position does in fact have MSS access.
- Then check to make sure that the subordinate's position Reports to the managerial position. This is the reason for the discrepancy in 99.9% of the cases.
- If the relationship is not correct, then create either a 113 or a 124 action to resolve the issue!



Examples

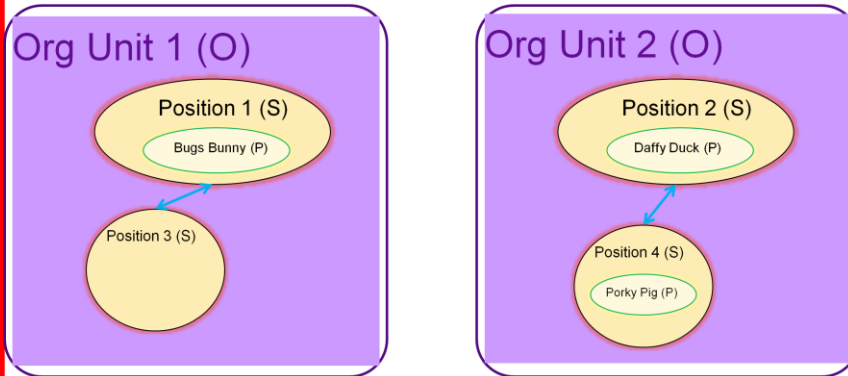
- For the remainder of the slide show we will examine specific situations.

Changing the P to S relationship (Employee Transfer)



In this example we want to move Porky Pig into Position 4. What happens when we perform a PA Transfer?

Changing the P to S relationship (Employee Transfer)

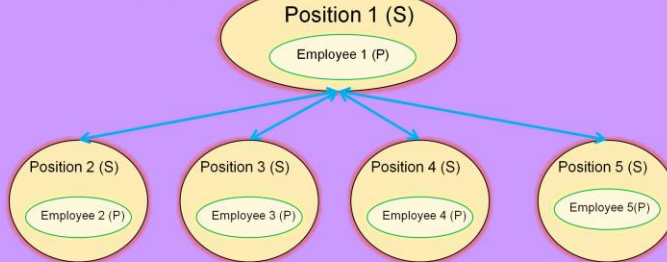


Porky picks up the characteristics of its new place in the Org Structure. On the PA20 Org Assignment screen you will find that Porky's position number now is what is assigned for position 4 and his Org Unit number is what is assigned for Org Unit 2. Changing the P to S relationships changes the Org Assignment information for the employee.

Changing the S to S via a Change Supervisor of Position (124)



Org Unit 1 (O)



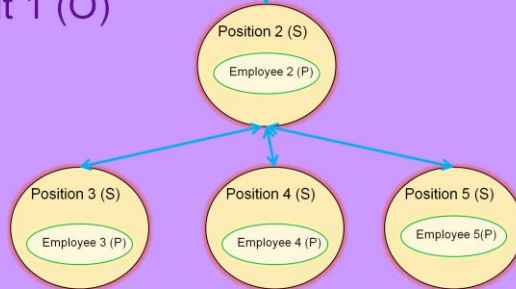
In this example, position 1 is going to be abolished and we need positions 3, 4, & 5 to now report to position 2. Position 2 will also need take on position 1's previous Reports to relationship. We can perform all of these functions using a Change Supervisor of Position (124) action.

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Changing the S to S via a Change Supervisor of Position Action (124)



Org Unit 1 (O)

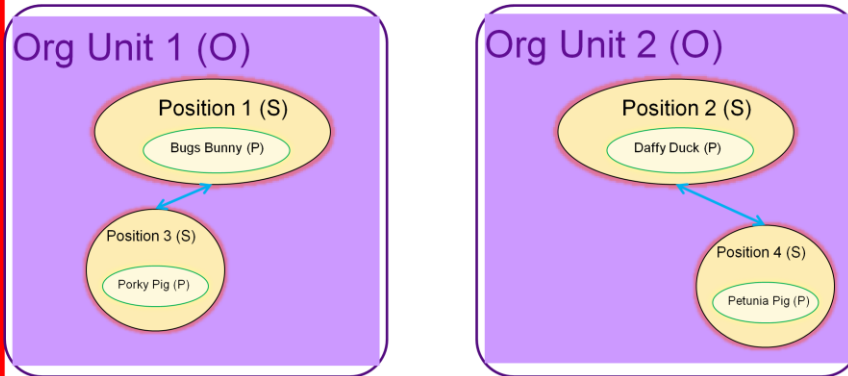


The reason that we can use the 124 action is that none of positions are changing org units. They are staying exactly where they are.

On the next example, let's see what happens when a 124 action is used incorrectly.

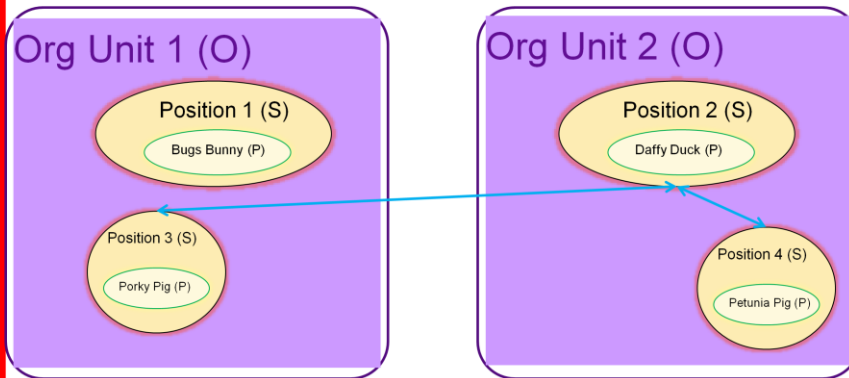
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Changing the S to S via a Change Supervisor of Position Action (124)



In this example, the manager in org unit 2 (Daffy Duck) has let you know that he should be able to see Porky Pig in MSS. You've checked and sure enough the S to S relationship is incorrect. You decide to perform a 124 action on Position 3 so that MSS works correctly for him. What happens?

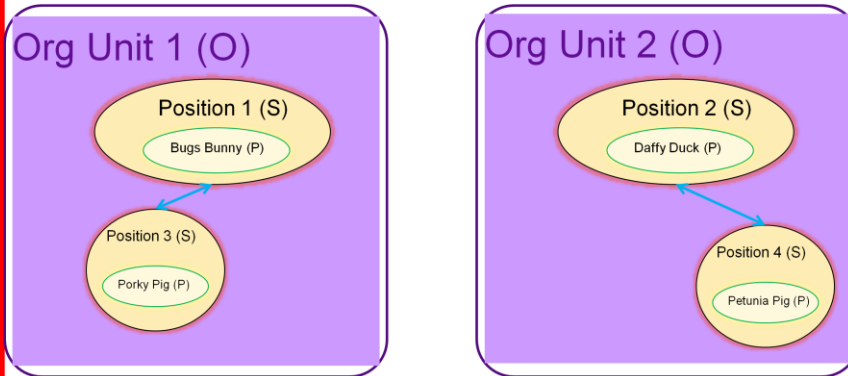
Changing the S to S via a Change Supervisor of Position Action (124) - **INCORRECTLY**



The good news is that MSS works correctly now, but unfortunately you neglected to take into account the S to O relationship. Changing the S to S relationship does not change the S to O relationship. This must be done separately.

What action should have been done?

Changing the S to S and S to O via a Position Transfer (113) action.

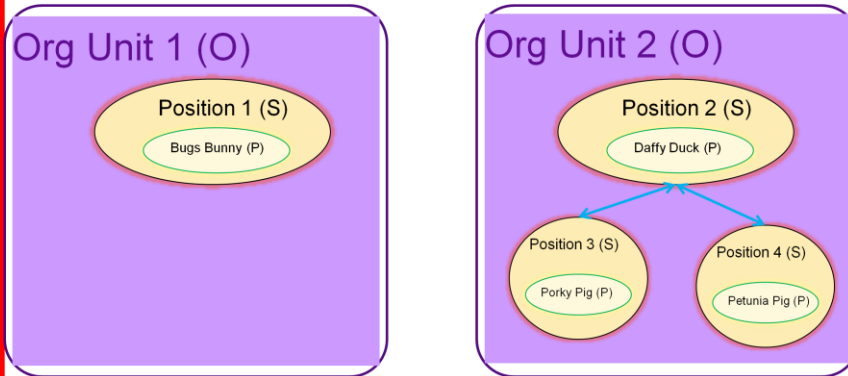


In this case you should have recognized that the subordinate position was not in the same org unit as the supervisor and performed a Position Transfer (113) action instead.

The 113 action will change both the S to S as well as the S to O relationship. The next slide shows the results when the action was done correctly.

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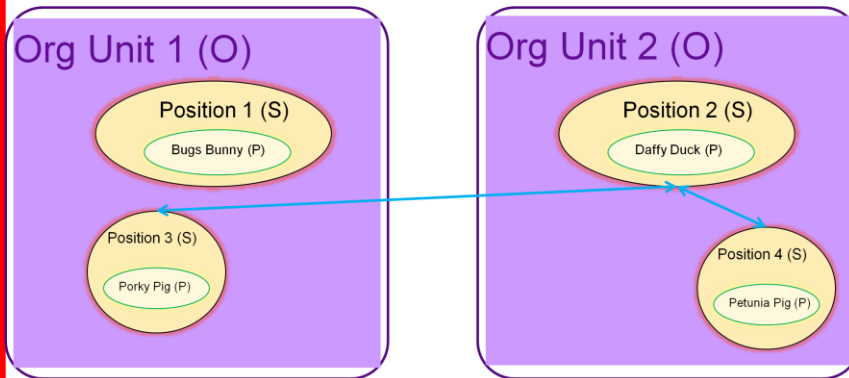
Changing the S to S and S to O via a Position Transfer (113) action.



You can see that now the position has moved into the same org unit as its supervisory position.

Notice that when the position moved, the holder relationship stayed intact and moved with it.

Changing the S to O via a Position Transfer (113) action.

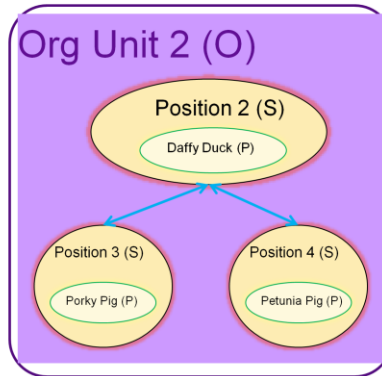


Let's revisit this slide to determine how to fix this situation.

Here, the S to S relationship is correct, but you notice that your BI reports are a bit off. You use PO13 or PPOSE and realize that Position 3 is in the wrong org unit. What do you do to resolve this issue?

(Hint: Look at the title of the slide!)

Changing the S to O via a Position Transfer (113)

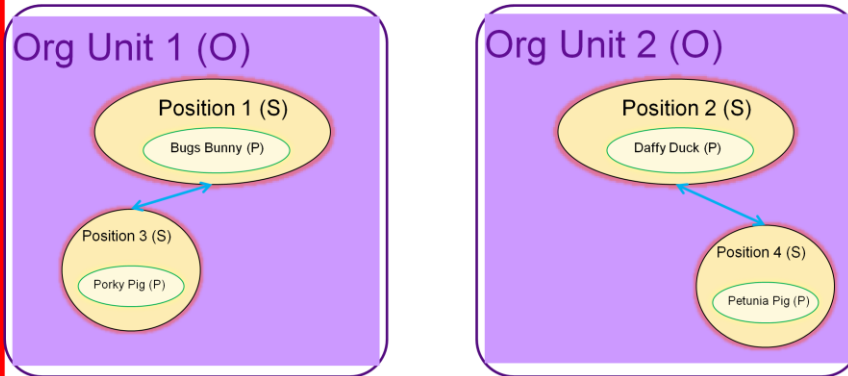


Yes! A 113 action.

When performing a 113 action it is not mandatory that you must change the S to S relationship. If it is correct, then keep the same data and only change what is necessary.

However, in the vast majority of cases, if a position is changing org units it is also going to need to change supervisors. The next example shows what happens if a 113 is used incorrectly.

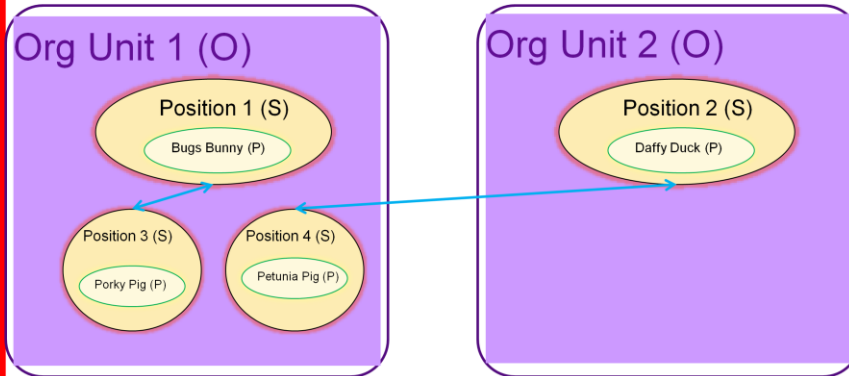
Changing the S to S and S to O via a Position Transfer (113) action.



In this example you perform a Position Transfer (113) on position 4 to move it into Org Unit 1. When completing the PCR you neglect to change the supervisory relationship.

What does the result look like?

Changing the S to S and S to O via a Position Transfer (113) action.



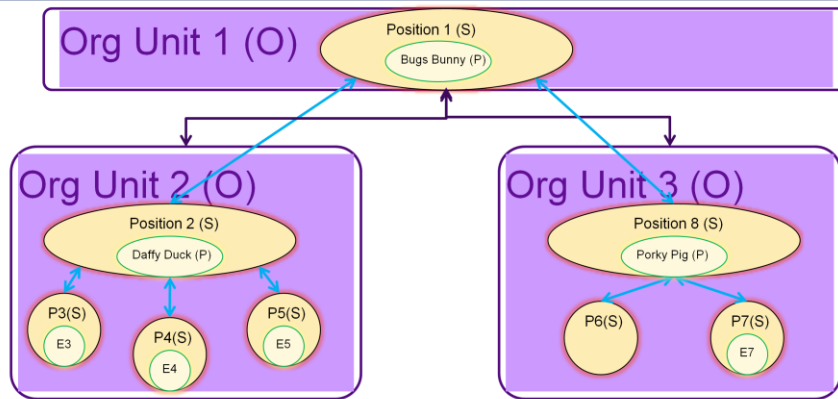
You end up having a position that is not in the same org unit as its supervisory position and BI data will be incorrect.

A Change Supervisor of Position (124) action will now correct this situation. The original PCR should have changed the supervisory position as well as the org unit.

Changing the S to O relationship does not change the P to S relationship.



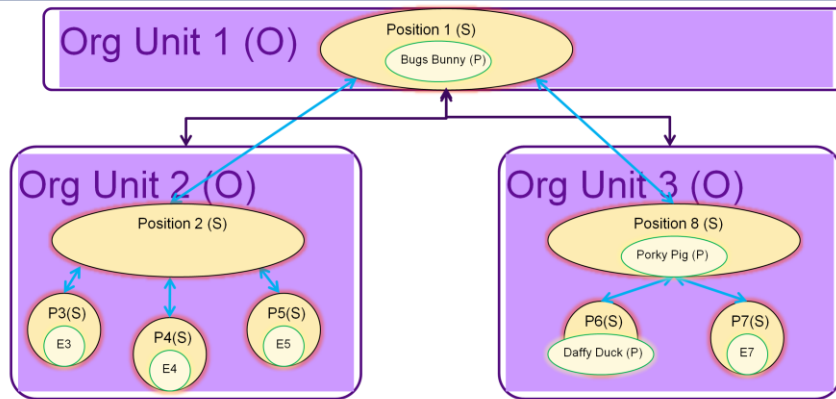
Supervisory Position Transfer



In this scenario, position 2 is to be abolished. We need to find a new home for Daffy Duck. We see that Position 6 is vacant, so we can use that one. However, Daffy still needs to be the supervisor of positions 3, 4 & 5. What is the best course of action?



Supervisory Position Transfer

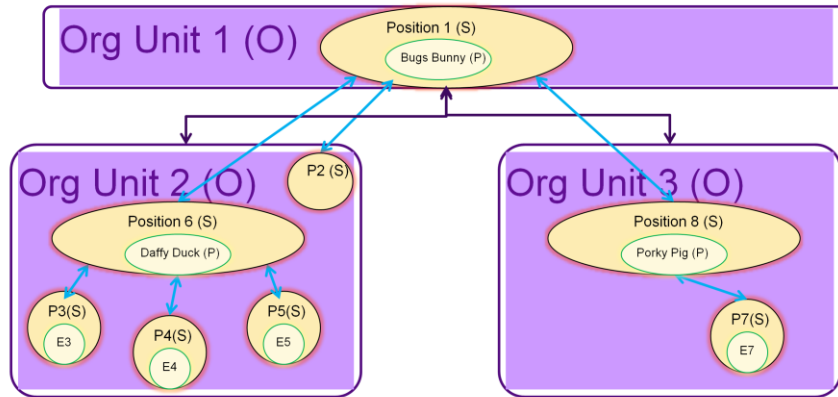


The first action is to do a PA transfer to move Daffy into position 6.

Daffy needs to reestablish his supervisory relationships. What is the best way to accomplish this?



Supervisory Position Transfer



There is a lot to do to make this happen. First we must move Position 6 into Org Unit 2. We also need to correct the S to S relationship for Position 6. Finally we need to correct all of the S to S relationships for positions 3, 4 & 5. Lastly, we need to break the Manages relationship for position 2 and establish that relationship for position 6.

38 When position 2 is abolished the S to S relationship with position 1 will be delimited.



Review of 113 and 124 actions

- Change Supervisor of Position (124) actions will only affect the S to S relationship.
- Position Transfer (113) actions can change both the S to O as well as the S to S relationships.
- These relationships are independent of one another and changing one does not automatically change the other.
- Similarly, changing the S to O relationship does not affect the P to S relationship.

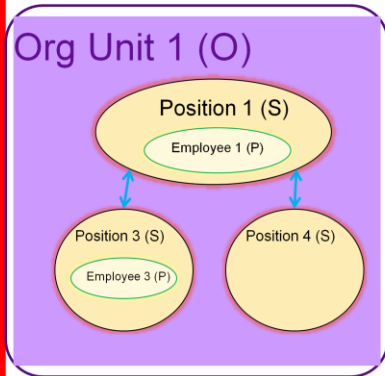


Position Abolishment

- Positions need to be abolished from time to time.
- What are the effects of abolishing positions?
- What are some possible repercussions of Abolishing positions?
- Who can abolish positions?



Position Abolishment



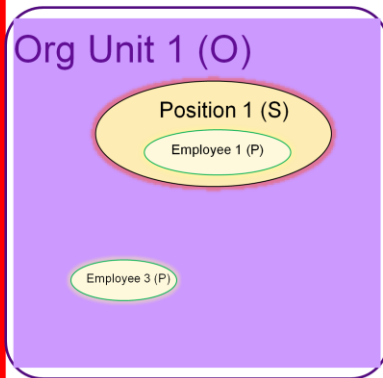
In this example you have asked that positions 3 and 4 be abolished. BEST does not check behind you and performs the actions.

What happens?

When requesting an abolishment always include a reason to insert on the note that will be created as to why the position is being abolished!!



Position Abolishment



Position 4 is a success. The position was vacant on the effective date of the abolishment and the relationships and infotypes were delimited successfully.

But unfortunately, Employee 3 is left without a position! When abolishing the position, the P to S relationship was delimited so now this employee does not have a home.

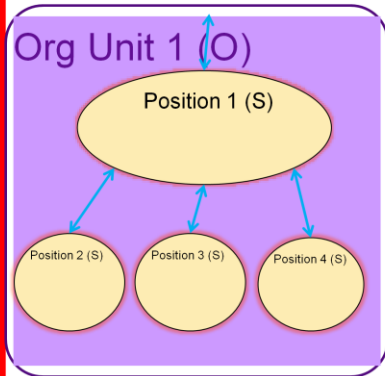
Always be sure to check that a position is vacant on the effective date of the requested abolishment.

When requesting an abolishment always include a reason to insert on the note that will be created as to why the position is being abolished!!

It is not enough that a position be vacant on the day of the request for the abolishment. It must be vacant on the effective date for the abolishment.



Position Abolishment



Let's take a look at 1 more possible repercussion if you are not diligent at checking relationships before abolishing a position.

In this example you have asked that the vacant position 1 be abolished, but that is it.

When requesting an abolishment always include a reason to insert on the note that will be created as to why the position is being abolished!!



Position Abolishment

Org Unit 1 (O)

Position 2 (S)

Position 3 (S)

Position 4 (S)

Positions 2, 3 and 4 were also vacant, so there are no MSS implications to be had.

But, these three positions are now 'lost' and do not have a supervisor. They have no position to report to. Employees placed into these positions in the future will not show up in anyone's MSS.

They should have been transferred, abolished, or new supervisory position moved in when position 1 was abolished.

When requesting an abolishment always include a reason to insert on the note that will be created as to why the position is being abolished!!



Manages relationship (The Chief Hat)

- The Manages relationship can only be changed at BEST Shared Services.
- A position should Belong to the same org unit which it Manages.
- If it is not, then the OrgUnit view in Org Plus will return incorrect data.
- Anytime a supervisory position moves from one org unit to another, then the Manages relationship must be broken by BEST.

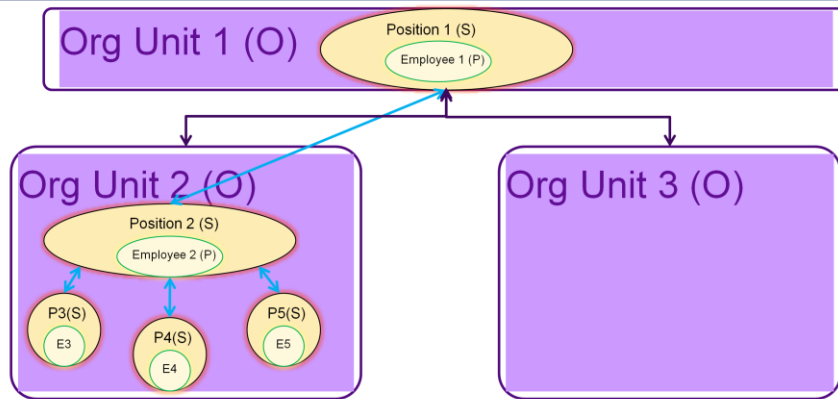


Org Unit Transfers

- Thus far we have only examined organizational changes involving positions.
- Some org changes involve full org units. Either a new org unit needs to be created or an org unit needs to be transferred.
- These types of changes can only be performed by BEST.
- **Best business practice is to call BEST and discuss these changes before submitting change requests.**



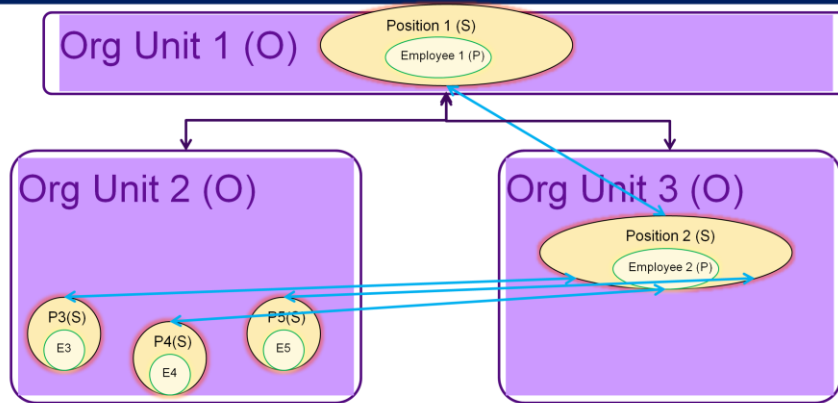
Org Unit Transfers



In this example your agency has identified that a new org unit needed to be created and you requested this from BEST. You then asked that Position 2 be transferred into this new unit and be made the chief. That is all you requested. What does the result look like?



Org Unit Transfers

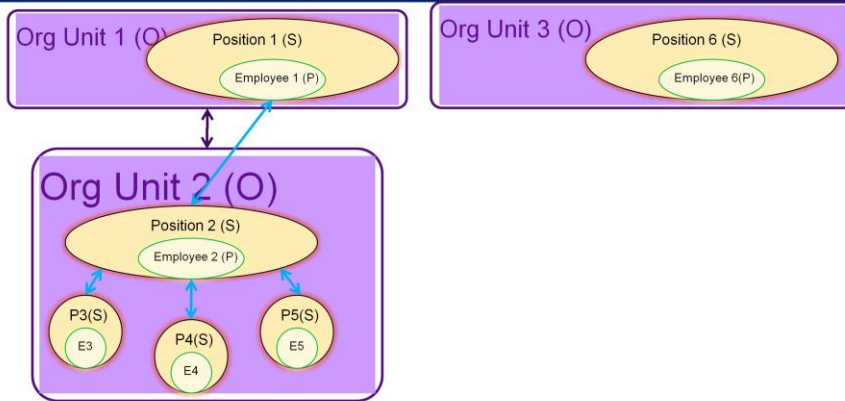


Subordinate positions are not locked to their supervisor's org unit assignment. The S to S relationship is not broken either! If the supervisory position is moved but the subordinate positions are not, then you get the situation as above. You must request both!

A supervisor's subordinate positions do not move with it when it transfers org units. The S to O and S to S relationships are independent of one another.



Org Unit Transfers



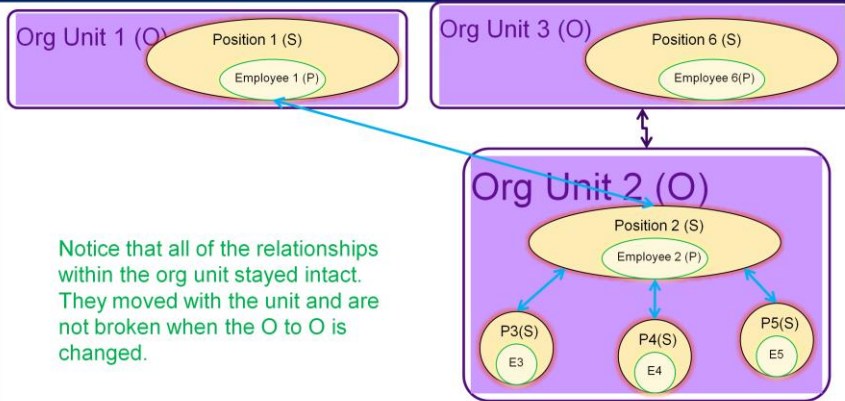
In this example you have requested that Org Unit 2 now report to Org Unit 3 and that is all you have requested. What does the result look like?

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Here, the S to S relationship between Position 2 and Position 1 has a corroborating relationship between Org Unit 2 and Org Unit 1.



Org Unit Transfers



The result here is that the supervisor of Org Unit 2 is still reporting to a position in Org Unit 1. Your BI reports and Org Plus will return bad data if this is not addressed. A Change Supervisor of Position (124) action will correct this error because Position 2 is not changing org units.

The text in green in this slide should not be overlooked. When an org unit is moved, the O to O relationship is changed. However, all of the S to O relationships stay intact. So when you move an entire org unit, all of its contents move with it. You can now see the O to O and S to S relationships do not match up. This will result in inconsistent BI data.



When to contact BEST

- BEST is a useful resource to help you with your organizational changes and should be contacted whenever you have any questions about restructuring projects.
- BEST must be contacted whenever positions need to be abolished.
- BEST must be contacted whenever an org unit needs to be established, moved or renamed.
- BEST is useful in order to speed up projects that involve 5 or more Position Transfer or Change Supervisor of Position actions.



End

QUESTIONS?