



OM200- Organizational Management Reference Guide

PPOSE Navigation Tips



OM Navigation

OM Object Relationship Types

| Relationship Type | Relationship Description |
|-------------------------------|------------------------------|
| Reports (line) to (A/002) | Org Unit to Org Unit |
| Is line supervisor of (B/002) | Org Unit to Org Unit |
| Cost Center (A/011) | Org Unit to Cost Center |
| Incorporates (B/003) | Org Unit to Position |
| Is Managed by (B/012) | Org Unit to (Chief) Position |
| Describes (A/007) | Job to Position |
| Belongs to (A/003) | Position to Org Unit |
| Is described by (B/007) | Position to Job |
| Holder | Person to position |

SAP Icons

Use the following icon legend to identify organizational objects displayed in SAP:

| | |
|--|-------------------------------|
| | Job |
| | Organizational unit |
| | Person |
| | Position |
| | Task |
| | User |
| | Chief |
| | Vacant position |
| | Unoccupied position |
| | Obsolete Position |
| | Position with several holders |

The screenshot shows the SAP 'Organization and Staffing' interface. On the left is the 'Object Manager' tree view. The main area displays a list of organizational units. A yellow callout box labeled '1' points to the 'Hide Object Manager' button in the top toolbar. Another yellow callout box labeled '2' points to the 'Column Configuration' button in the top toolbar. A 'Column Configuration' dialog box is open, showing a list of 'Displayed columns' with checkboxes for Code, ID, Relationship text, Chief, Validity period, Relationship Period, Percentage, and Workflow. The 'Object Manager' is currently hidden.

Hide/Show Object Manager

- To hide or show the Object Manager, select the Settings menu.
- To select the columns to be displayed click the Column Configuration button.

PPOSE Screen Layout



Organization and Staffing Display

Object manager scenario: OME000

08/08/2007 + 3 Months

| Staff Assignments (Structure) | Relationship text | Chief | Valid from | Valid to | Workflow |
|-------------------------------|-----------------------|-------|------------|-----------|----------|
| Office of the State Auditor | | | 01/01/1900 | Unlimited | |
| OSA Chief Deputy | Is line supervisor of | | 01/01/1900 | Unlimited | |
| OSA Support | Is line supervisor of | | 01/01/1900 | Unlimited | |
| OSA Support Operations | Is line supervisor of | | 01/01/1900 | Unlimited | |
| Accountant I | Incorporates | | 08/02/2007 | Unlimited | |
| Accountant I | Incorporates | | 08/02/2007 | Unlimited | |
| Accountant I | Incorporates | | 08/02/2007 | Unlimited | |
| Accountant I | Incorporates | | 08/02/2007 | Unlimited | |
| Accountant I | Incorporates | | 08/02/2007 | Unlimited | |
| Accountant I | Incorporates | | 08/02/2007 | Unlimited | |
| David Dean Carson | Holder | | 08/27/2007 | Unlimited | |

Details for Position Accountant I

Position: Accountant I, Job: ACCOUNTANT I, Valid On: 08/08/2007

Staffing status: Vacancy open









Holder: David Dean Carson, Description: Subtp

This is the initial screen for displaying the organization and staffing structure.

- **Search area** – The top left portion of the screen, which is used to search for individual organizational objects according to your search criteria.
- **Select area** - The bottom left portion of screen is the Selection area (search results area), where the organizational objects appropriate to your search appear. By double-clicking on an object in this area, you can transfer the object to the top right portion of the screen, which is the Overview area.
- **Overview area** - In the overview area, you can view the object within its appropriate organizational environment.
- **Detail area** - The bottom area of the screen, referred to as the Detail area, is where you can view the object in more detail.

PPOSE screen buttons



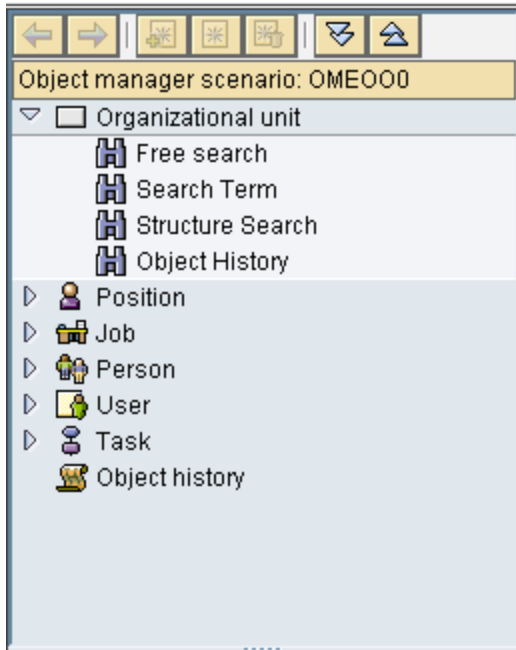
| Button | Description |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>The “Goto” button allows you to view the organizational structure in different ways. For example, by selecting Organizational structure you can view only the organizational units without any position information. By selecting Staff assignments (structure), you can view both the organizational units and the positions attached to them.</p> |
|  | <p>The “One level up” button allows you to view the structure one level above the point you are currently viewing.</p> |
|  | <p>The “Column Configuration” button allows you to select the columns you would like to view for example, Object ID Number or Validity Period.</p> |
|  | <p>The “Icon legend” button allows you to view a legend of what various icons represent within the organizational structure.</p> |
|  | <p>The “Large/small results list” button allows you to maximize or minimize the view of the search area.</p> |
|  | <p>The “Date and preview period” button allows you to view the organizational and reporting structure as of a specified past, present, or future date.</p> |
|  | <p>This button minimizes the Detail area of the screen to expand the Overview area.</p> |
|  | <p>This button maximizes the Detail area of the screen to view the detailed information pertaining to an object.</p> |

PPOSE Procedure




To change the organization you are viewing:

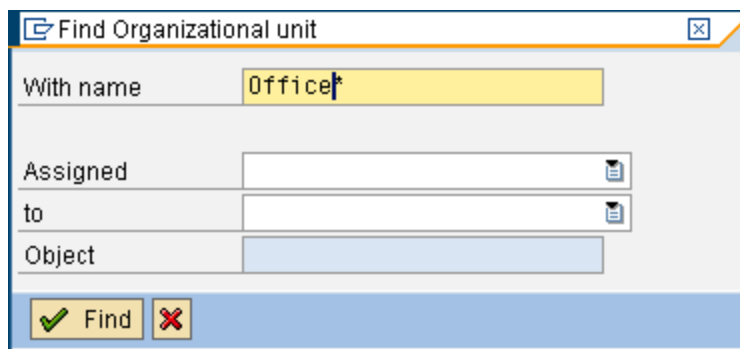
1. Ensure you have the Object Manager window displayed on the left side of the screen. It looks like this:




If the Object Manager does not appear on your screen, use the menu path Settings > Show Object Manager (this same menu path allows you to hide the Object Manager if you do not need to search for other organization units).

Click on  Search Term in the top panel to open a search window.

2. From the search window, enter the text name of the org unit you are searching for, or alternatively, enter the 8-digit org unit number.




3. Click the  button to generate a list of org units matching your search criteria.

PPOSE Procedure (Con't)



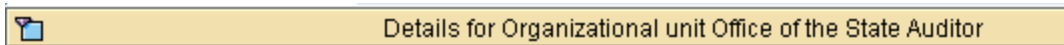
4. Look in the results pane (the bottom portion of the Object Manager) and double click on the organization unit for which you wish to display the organizational structure.



| Existen... | Name | ID |
|------------|-----------------------------------|------------|
| | Office of the State Auditor | O 10000008 |
| | Office of the State Controller | O 10000027 |
| | Office of Administrative Hearings | O 10000033 |


To hide the details section of the screen:

1. To toggle the details of the screen contains some additional details for each org unit, position, or person selected, but can be hidden to make it easier to view the org structure.

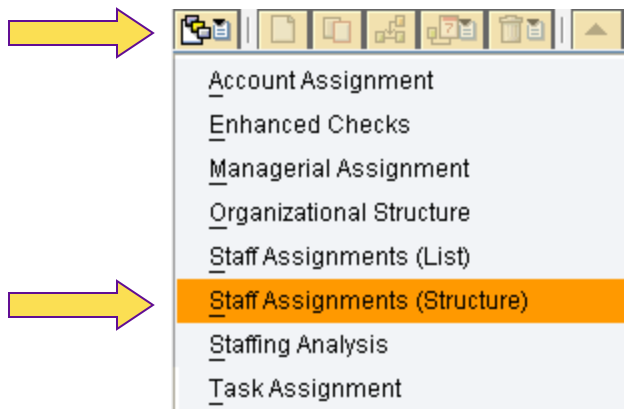


The details section of the screen contains some additional details for each org unit, position, or person selected, but can be hidden to make it easier to view the org structure.

To view the organizational structure:

1. There are several different types of views available from the Organization and staffing Display screen. To show org units, positions (including the “chief” designation), and people, click the Goto  button (located in the menu bar above the main

section of the window) and select *Staff assignments (structure)*







PPOSE Procedure (Con't)




To view the organizational structure (Continued):

2. You can view different parts of the organization using the key below:

| Icon | Description |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | This icon denotes an organizational unit. The long text description is noted immediately to the right of the icon, and the short text description is available in the "Code" column. The name of the person holding the "chief" position for this organizational unit is listed in the "Chief" column. |
|  | This icon denotes a position and is listed under the appropriate organizational unit. The long text description is noted immediately to the right of the icon, and the short text description is available in the "Code" column. |
|  | This icon denotes the "chief" position for an organizational unit. A position becomes a "chief" position when the relationship "Manages..." is established between the position and org unit to signify the org unit manager. |
|  | This icon denotes a person. People are listed under the positions that they are holding. |

To view other options

1. To view other options, click the Column configuration button  on the toolbar. This lets you view other information about the organization you are viewing (such as relationship description, the ID numbers for each organizational object.

