ERP - PROJECT

SUGAMYA

END USER DOCUMENT

FOR

HUMAN CAPITAL MANAGEMENT

Organisation Management

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Document Control

This is a controlled document and will be maintained on UJVNL portal.

Changes to this document will be recorded below and must be published to all interested parties.

1.1 DOCUMENT HISTORY

Version	Date	Author	VERSION DETAILS
V01	16-02-2018	Vinay Kumar	First ISSUE

1.2 DISTRIBUTION

Date	Name	Purpose
	MS. Anupama	For Information
	Mr. Ankit	For Information

2 CREATE JOB

2.1 PURPOSE

Use this procedure to Create Job in the system using Expert Mode.

2.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

2.3 PROCEDURAL STEPS

Use the following menu path(s) to begin this transaction:
Select Human resources → Organization Management → Expert Mode → Display or use Transaction code (PO03).

Menu Path	Human resources → Organization Management → Expert Mode → Display or use Transaction code (PO03).
Transaction Code	PO03

Start the transaction using the menu path or transaction code.
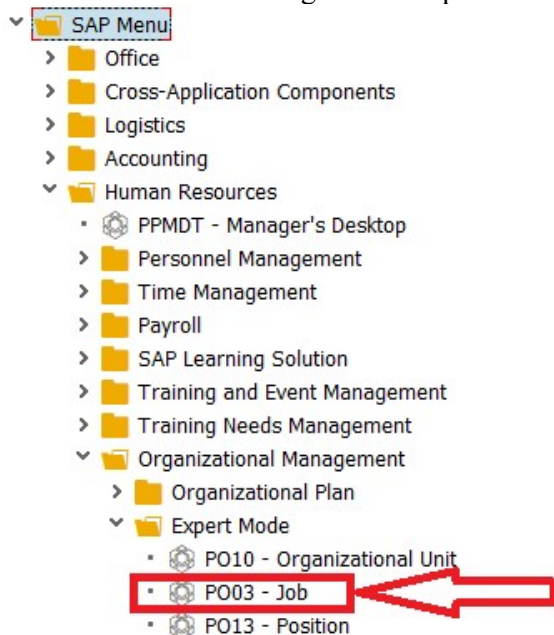
OR

Double-click [PO03 - Job] to start the transaction or enter Transaction code in the command button as shown

PO03

which will take you to next screen as shown below.

Select object tab as shown below and click create infotype ⬜ or press (F5).

Plan version	Current plan ⌄
Job	
Abbr.	

Active | Planned | Submitted | Approved | Rejected

Infotype Name	S..	⬛	Time period
Object			● Period
Relationships			From 16.02.2018 to 31.12.9999
Description			○ Today ○ Current week
Planned Compensation			○ All ○ Current month
Cost Planning			○ From curr.date ○ Last week
Standard Profiles			○ To current date ○ Last month
PD Profiles			○ Current Year
Job Evaluation Results			
Survey Results			Select.
Qualification Management			

This will take you to next screen as shown below:

Job	
Planning Status	Active
Validity	01012000 to 31.12.9999 👓 Change Information

Object	
Object abbr.	DGM
Object name	Deputy General MAnager - UM
Language Key	English ⌄

Be sure about the Validity periods. By default, system gives the begin date as current date and end date as 31.12.9999. Change the validity from to dates, then write Object abbr., Object name as shown below in the screen.

HCM – Organisation Management

For Internal Circulation Only

Then click save 💾 button. Message as "Record Created" will appear at the bottom as shown in the below screen.

2.4 RESULT

You have created Jobs in expert mode using the transaction code PO03.

2.5 COMMENTS

None.

3 CREATE ORGANISATION UNIT

3.1 PURPOSE

Use this procedure to Create Organizational Unit in the system.

3.2 OVERVIEW

In SAP the module Organization assignment is used to create the hierarchical reporting structure of Organization Units, Jobs and Position and assigning the position to Person during the Hiring Actions

3.3 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

3.4 PROCEDURAL STEPS

Use the following menu path(s) to begin this transaction:

Select **Human resources → Organization Management → Expert Mode → Simple Maintenance → Create or use Transaction code (PPOC_OLD)**.

Note: You access PPOC_OLD or CREATE only during the first-time creation of Org. Unit and from next time onwards use PPOM_OLD (Change)

Menu Path	**Human resources → Organization Management → Expert Mode → Simple Maintenance → Create or use Transaction code (PPOC_OLD)**
Transaction Code	PPOC_OLD

Start the transaction using the menu path or transaction code.

- SAP Menu
  - Office
  - Cross-Application Components
  - Logistics
  - Accounting
  - Human Resources
    - PPMDT - Manager's Desktop
    - Personnel Management
    - Time Management
    - Payroll
    - SAP Learning Solution
    - Training and Event Management
    - Training Needs Management
    - Organizational Management
      - Organizational Plan
      - Expert Mode
        - PO10 - Organizational Unit
        - PO03 - Job
        - PO13 - Position
        - PO01 - Work center
        - PFCT - Task Catalog
        - PP01 - General
        - Simple Maintenance
          - PPOC_OLD - Create
          - PPOM_OLD - Change
          - PPOS_OLD - Display

OR

Double-click **PPOC_OLD - Create** to start the transaction or enter Transaction code in the command button as shown

`ppoc_old`
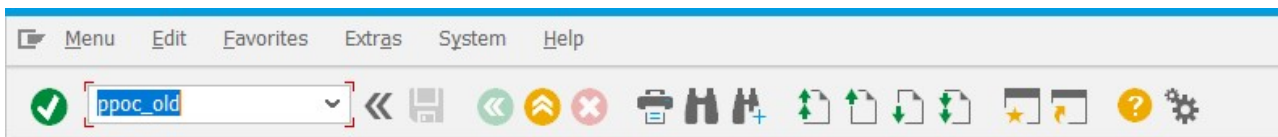
Create Organizational Unit

| Organizational unit | Abbr. | UJVN Ltd. |
| Name | | UJVNL - Manpower |

| Validity period | | 01.01.2000 To 31.12.9999 |

View
- ⦿ Overall view
- ◯ Human Resources view

Before clicking on the create button be sure about the Validity periods. By default, system gives the begin date as current date and end date as 31.12.9999. You must adjust the begin date as per the requirement. In the initial stages of implementation most of the times you are required to follow the cut of dates for building organization structure.

Field Name	M/R/O/C	Description
Organizational Unit Abbr.	R	Input Organizational Unit Abbr.
Name	R	Input Organizational Unit Name
Validity Period	R	Input Organizational Unit Validity Period i.e. from the date of starting the organizational unit.

Click on this button to create the Org unit. Once u click on the create button, the system will display the screen as shown below.

Organizational Structure / Change

Staff assignments

Plan version 01 Current plan   01.01.2000 — 31.12.9999

Find by
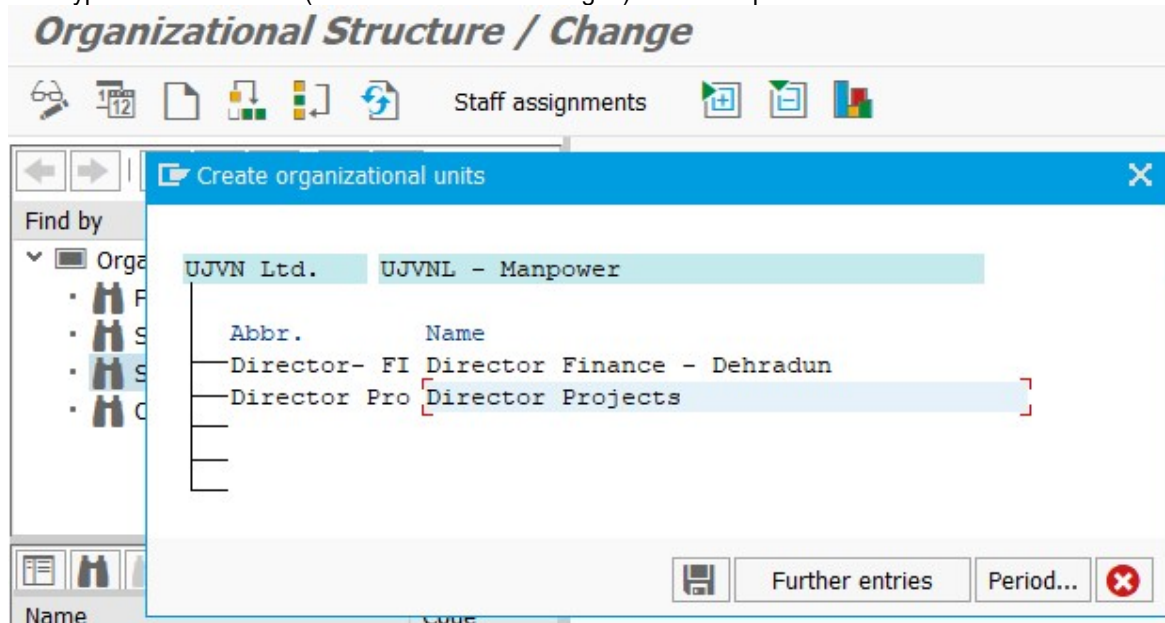- ⌄ Organizational unit
  - Free search
  - Search Term
  - Structure Search
  - Object History

UJVNL — Manpower

Name	Code
SAP UJVNL	SAP UJVNL
UJVN - Ltd.	UJVNL-Final
UJVN : Root Org. Unit	UJVN
UJVN Limited	UJVN
UJVN Limited1	UJVN
UJVNL - Over.Training	UJVNL
UJVNL - Over.Training with C	UJVNL - Core

Click on the organisational unit under which you have to create another subordinate organisational unit and then click [icon] or **(F7).** On clicking the next screen opens as shown below:
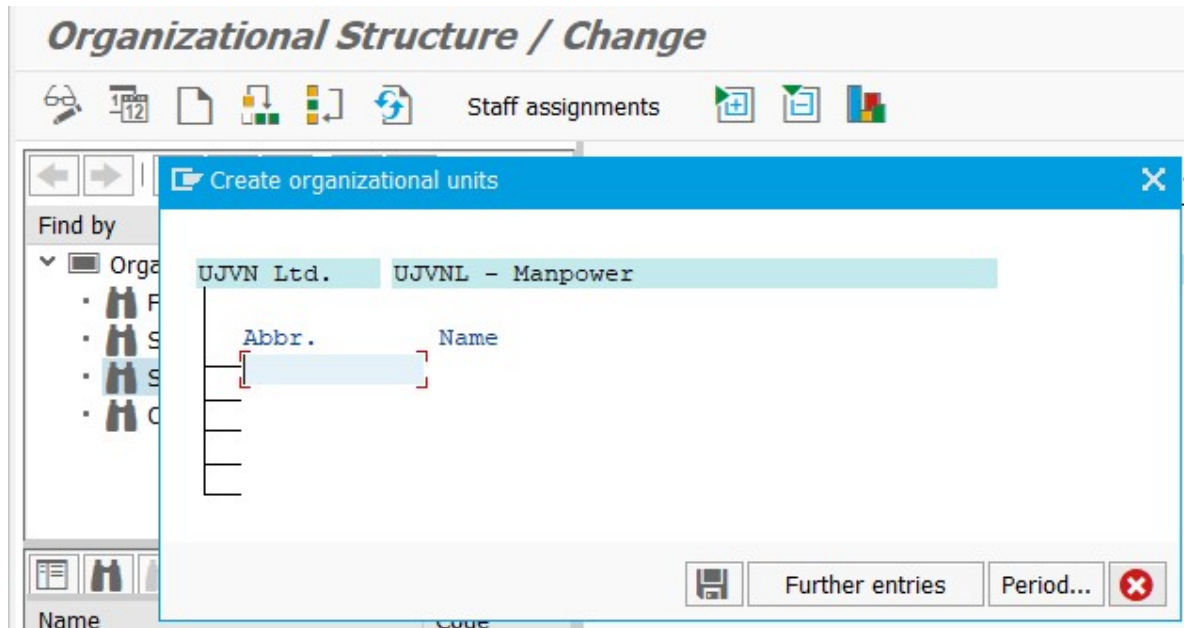

Now type the abbreviation (which should be Meaningful) and description as shown below:

If you want to create more organizational units, click on further entries `Further entries` will save the first five entries and opens up another 5 lines.

Now clicking on save [icon] button will create the Organizational Units as shown in the below screen.

Organizational Structure / Change
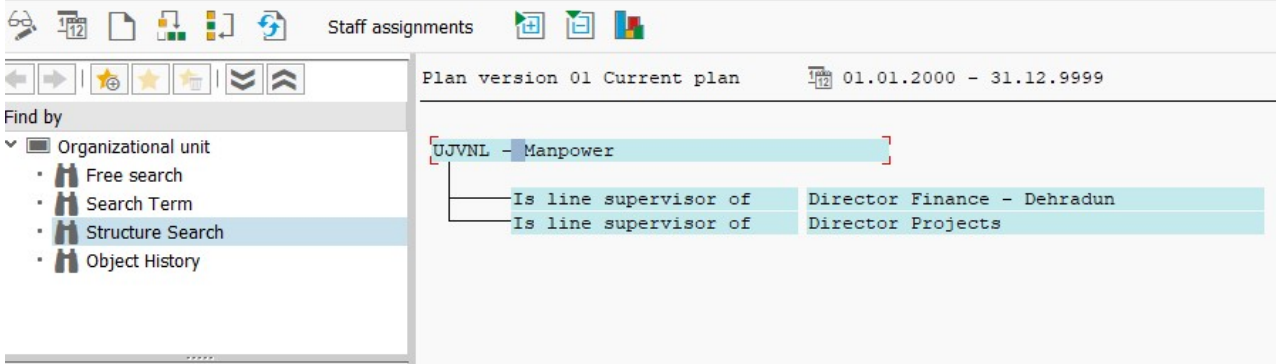
3.5 RESULT

You have Created Organizational Unit in the system with Subordinate units and with Organizational unit number.

3.6 COMMENTS

None.

4   CHANGE ORGANISATION UNIT

4.1 PURPOSE

Use this procedure to Change Organizational Unit in the system.

4.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

4.3 PROCEDURAL STEPS

Use the following menu path(s) to begin this transaction:

Select **Human resources → Organization Management → Organisational Plan → Organization & Staffing → Change or use Transaction code (PPOME).**

Menu Path	**Human resources → Organization Management → Organizational Plan → Organization & Staffing → Change or use Transaction code (PPOME).**
Transaction Code	PPOME

Start the transaction using the menu path or transaction code.
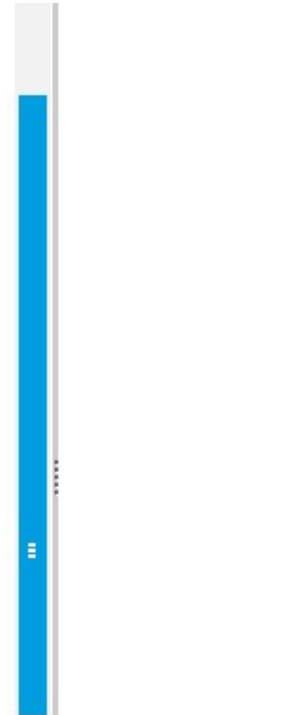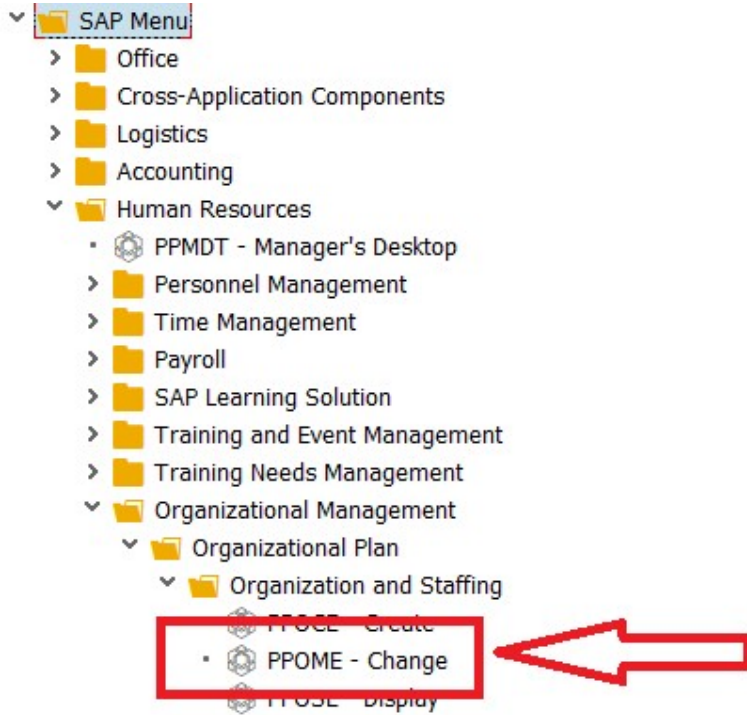
OR

Double-click PPOME - Change to start the transaction or enter Transaction code in the command button as shown PPOME which will take you to next screen as shown below.

It will show the last Organizational unit created. If you want to find or change the organizational unit click on Find by – Organizational unit button which is in left of the screen. As soon as you click the same new window will appear as shown below:
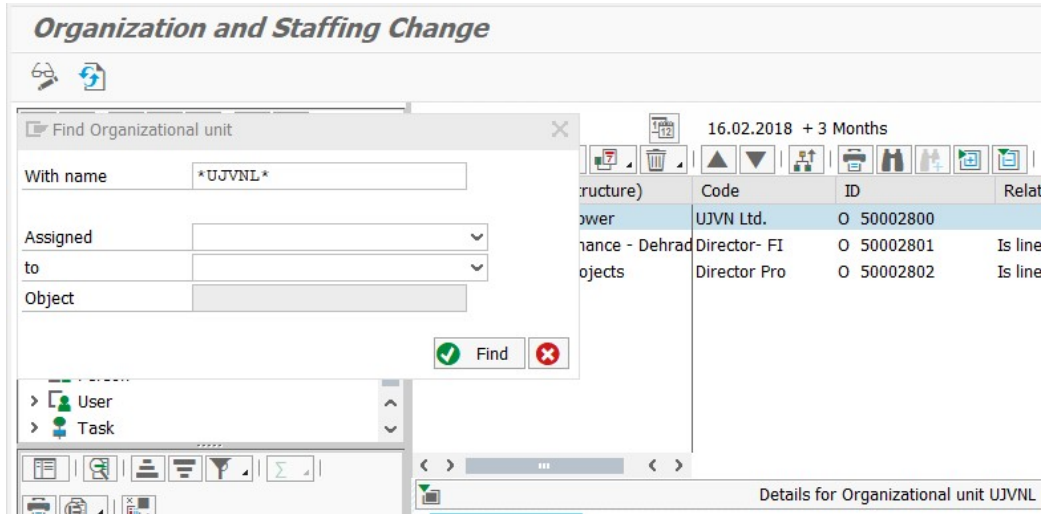
Insert first letter of the organizational unit and click find ✔ Find the name of the organizations will be seen in left side of the screen as shown below:
Select the Organizational unit and double click, new screen with that organizational structure will appear as shown in next screen.
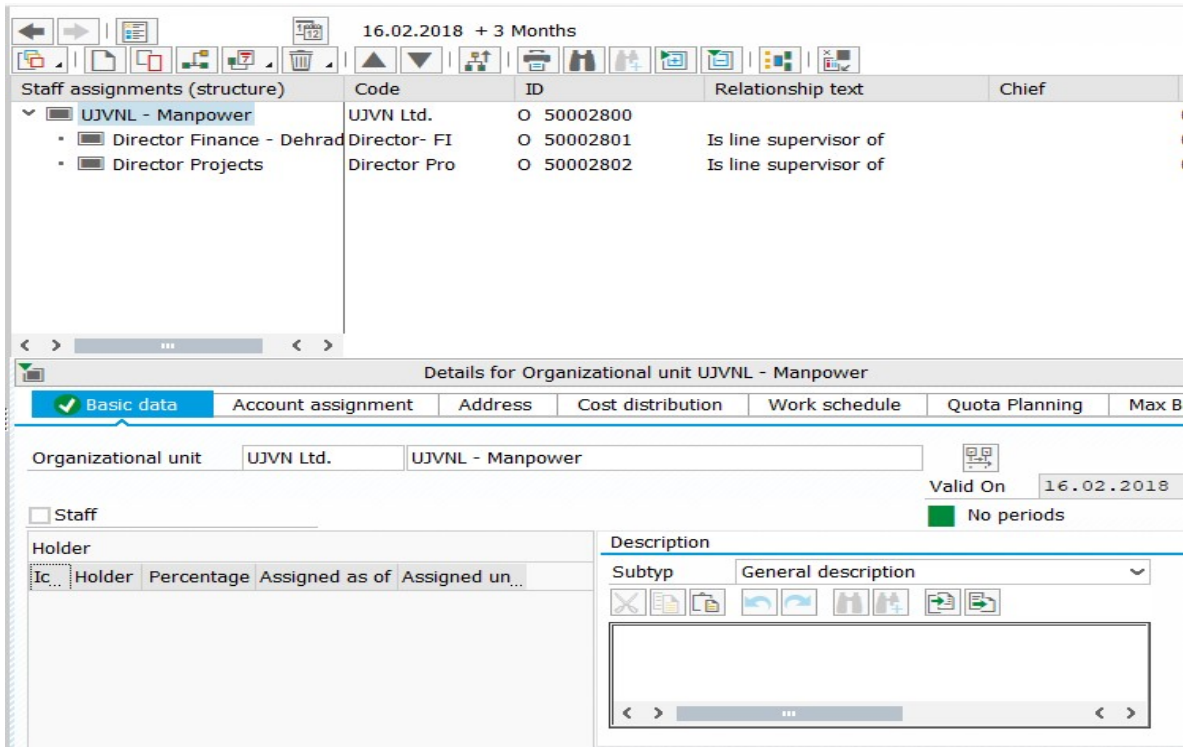
Double click on the organizational unit you want to change. You can change the basic data, account assignment, address, cost distribution etc. and then clicks save button 💾. Message in the bottom will appear as "Data has been saved".

Field Name	M/R/O/C	Description
Organizational Unit Abbr.	R	Input Organizational Unit Abbr.
Name	R	Input Organizational Unit Name
Validity Period	R	Input Organizational Unit Validity Period i.e. from the date of starting the organizational unit.

4.4 RESULT

You have Changed Organizational Unit plan in the system.

4.5 COMMENTS

None.

5   CHANGE STAFF ASSIGNMENT

5.1 PURPOSE

Use this procedure to Change Staff Assignments in Organizational Unit in the system.

5.2 PROCEDURAL STEPS

Positions are created in a organizational unit and the same is to be reassignment to another organizational unit.

Since the positions are the same can be reassigned to other org units (wherever they are supposed to be attached) as shown below:
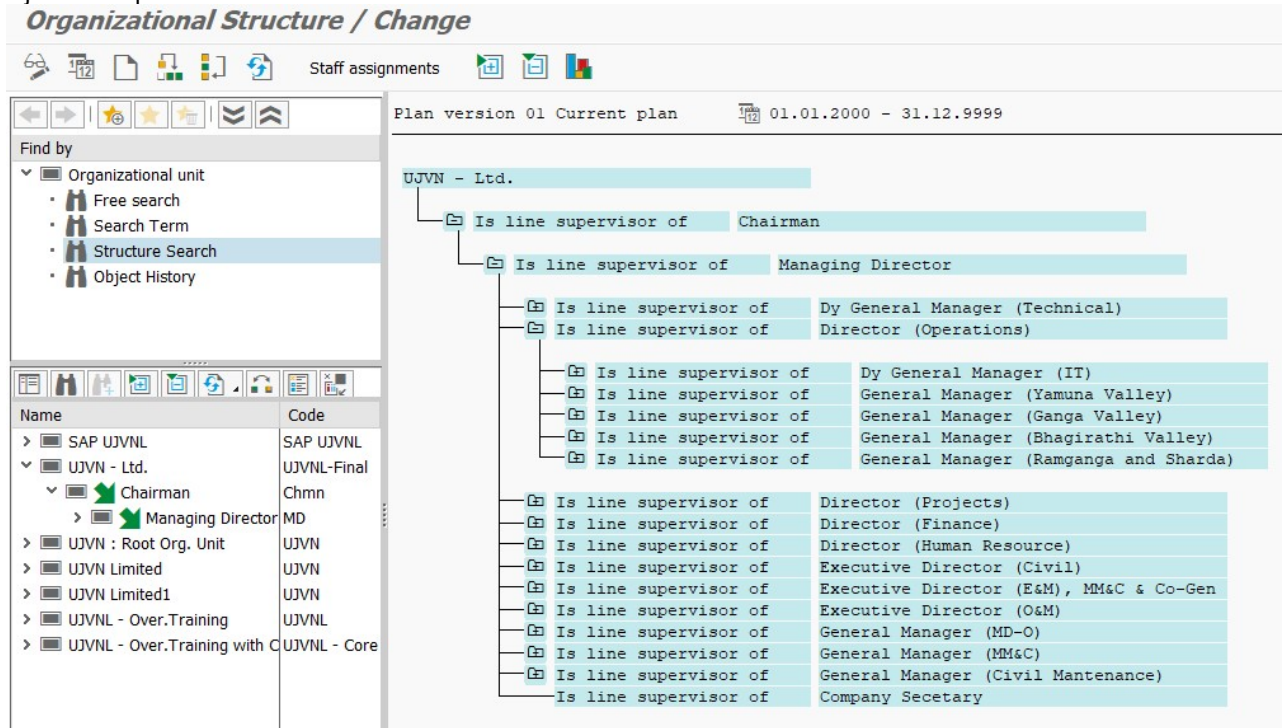
Step – I:

Place the cursor on the position you intend to transfer.

Step – II:

Click on the ⬛ button (Reassignment button), once the reassignment button is clicked a new window "choose superior object" will open

Step III:

The position can be reassigned to any of the organization units with symbol of pointing finger. However, you should make sure you are attaching to the right organizational unit to avoid unnecessary complications. Click on the other organizational unit where you want to reassign a position and then click ⬛ button (Reassignment button). This can be seen as shown below:
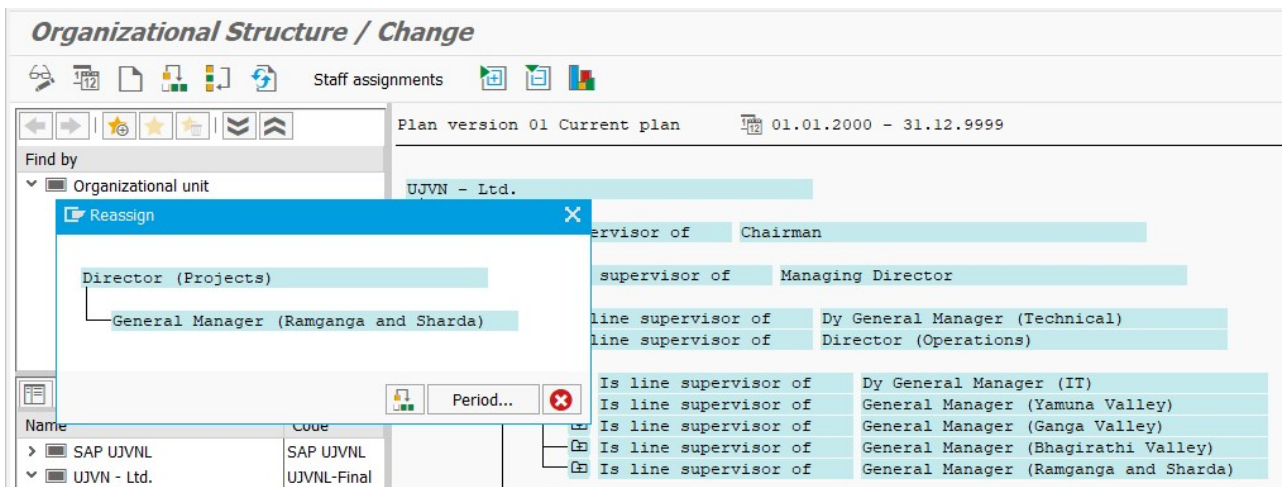
Message will appear at the bottom of the screen that "Record Changed".

5.3 RESULT

You have changed staff assignments from one organizational unit to other.

5.4 COMMENTS

None.

6   DELIMIT ORGANISATION UNIT

6.1 PURPOSE
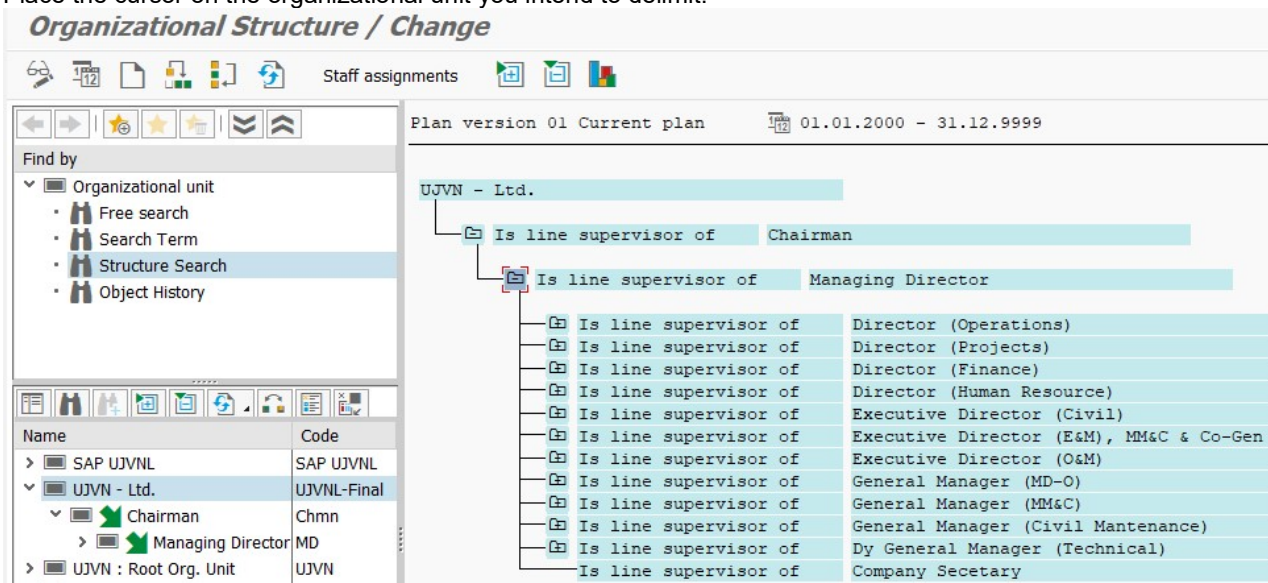
Use this procedure to delimit organizational unit.

6.2 PREREQUISITES

Organizational units are created

Since the organizational units are created, the same has to be delimited:
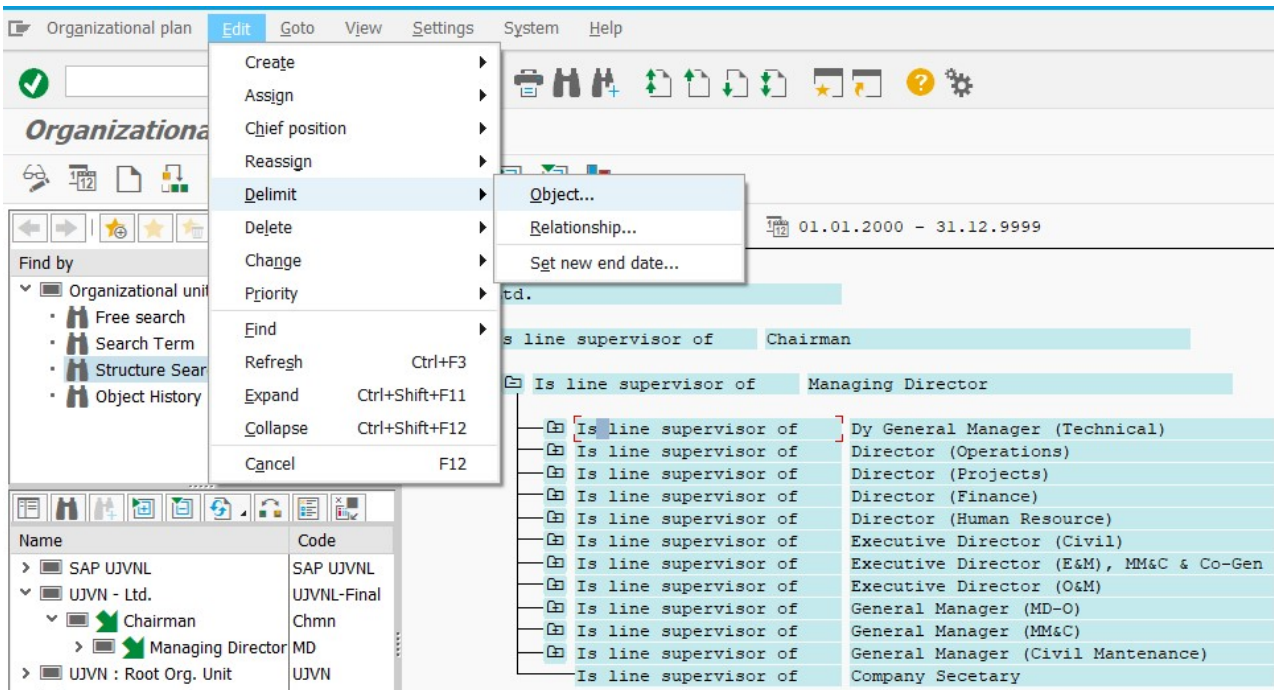
Step – I:

Place the cursor on the organizational unit you intend to delimit.
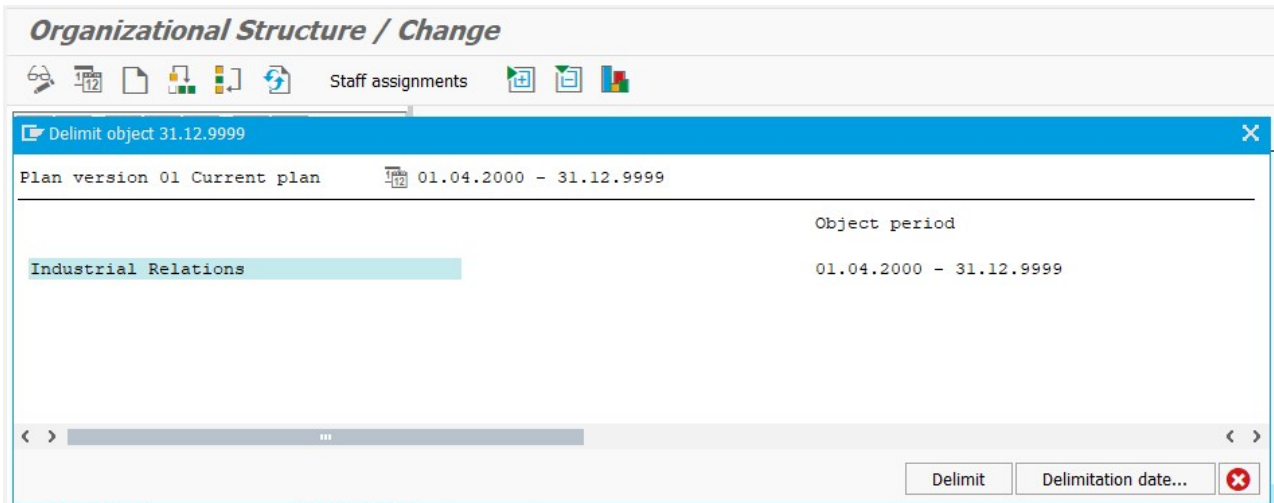
Step – II:
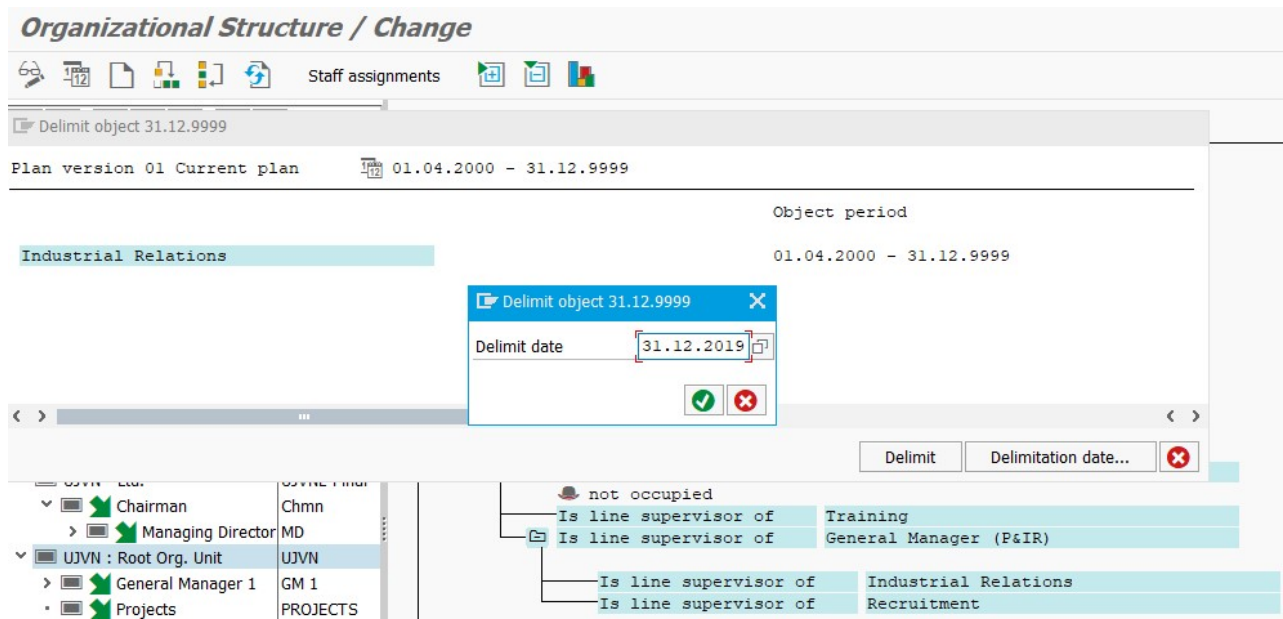
Click **Edit → Delimit → Object**

Step III:

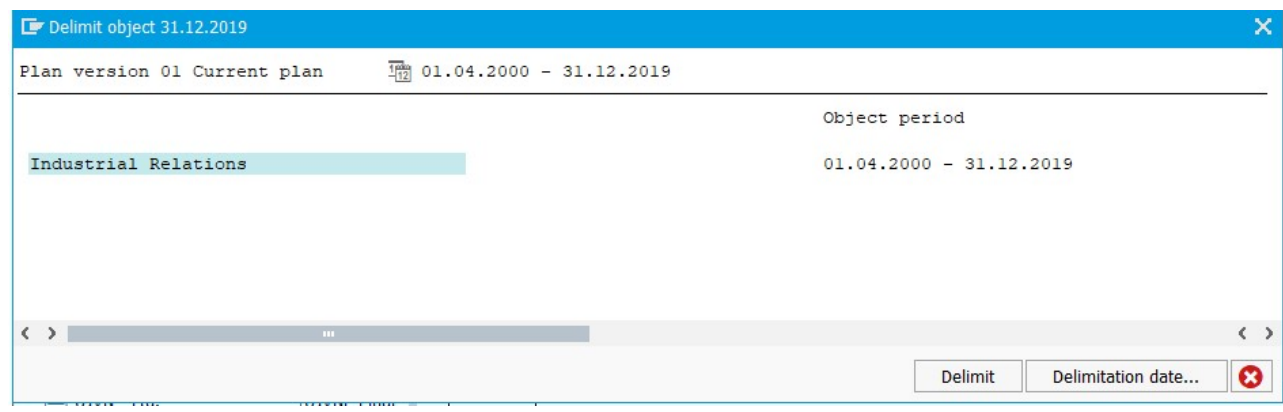This will take you to next screen as shown below:

Step IV:

Click on the Delimitation date [Delimitation date...] which will take you to next screen as shown below:

Organizational Structure / Change

Delimit object 31.12.9999

Plan version 01 Current plan   01.04.2000 - 31.12.9999

                                    Object period

Industrial Relations   01.04.2000 - 31.12.9999

> **Delimit object 31.12.9999** ✕
>
> Delimit date   31.12.2019
>
> ✅ ❌

Delimit	Delimitation date... ❌

🧍 not occupied

Is line supervisor of   Training
📁 Is line supervisor of   General Manager (P&IR)

       Is line supervisor of   Industrial Relations
       Is line supervisor of   Recruitment

UJVN : Ltd.:
∨ 🟩 Chairman   Chmn
   > 🟩 Managing Director MD
∨ 🟩 UJVN : Root Org. Unit   UJVN
   > 🟩 General Manager 1   GM 1
   • 🟩 Projects   PROJECTS

Delimit the object or change the date as below and click ✅ :

Step V : Then click Delimit button Delimit .

Delimit object 31.12.2019 ✕

Plan version 01 Current plan   01.04.2000 - 31.12.2019

                                    Object period

Industrial Relations   01.04.2000 - 31.12.2019

Delimit	Delimitation date... ❌

Message at the bottom will appear as Record Changed ✅ Record changed .

     6.3 RESULT

You have delimited the organizational unit.

     6.4 COMMENTS

None.

7   CREATE POSITION

7.1 PURPOSE

Use this procedure to Create position in the system using Expert Mode.

7.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

7.3 PROCEDURAL STEPS

Use the following menu path(s) to begin this transaction:
Select Human resources → Organization Management → Expert Mode → Display or use Transaction code (PO13).

Menu Path	Human resources → Organization Management → Expert Mode → Display or use Transaction code (PO13).
Transaction Code	PO13

Start the transaction using the menu path or transaction code.
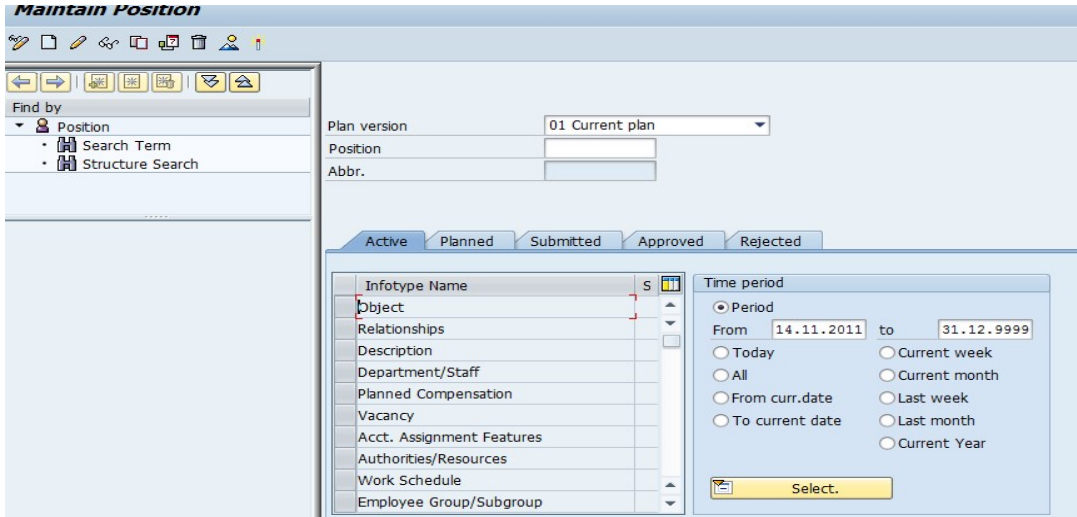
SAP Easy Access
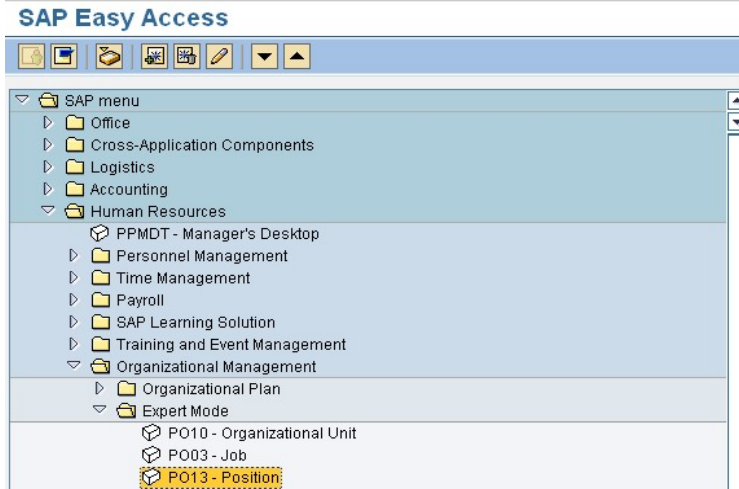
OR

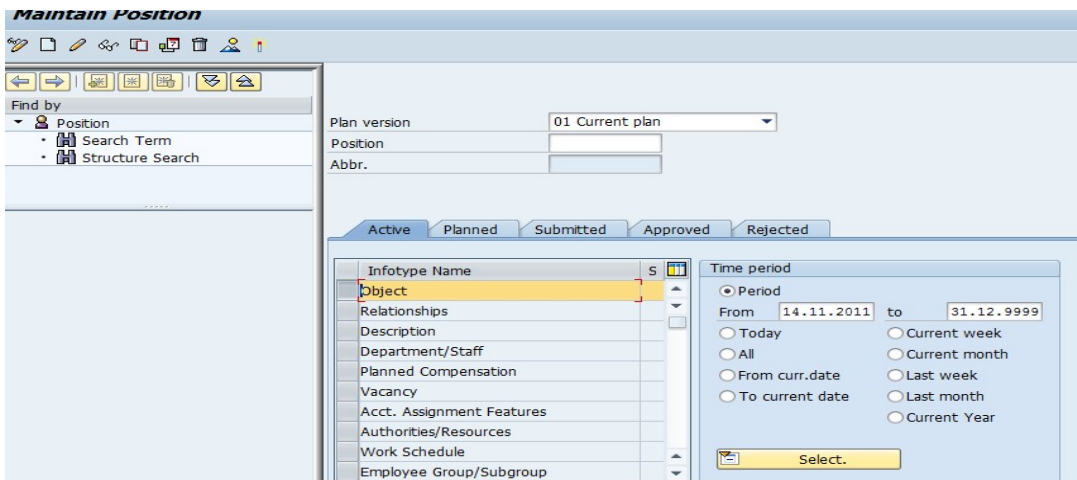**1.** Double-click PO13 to start the transaction or enter Transaction code in the command button as shown
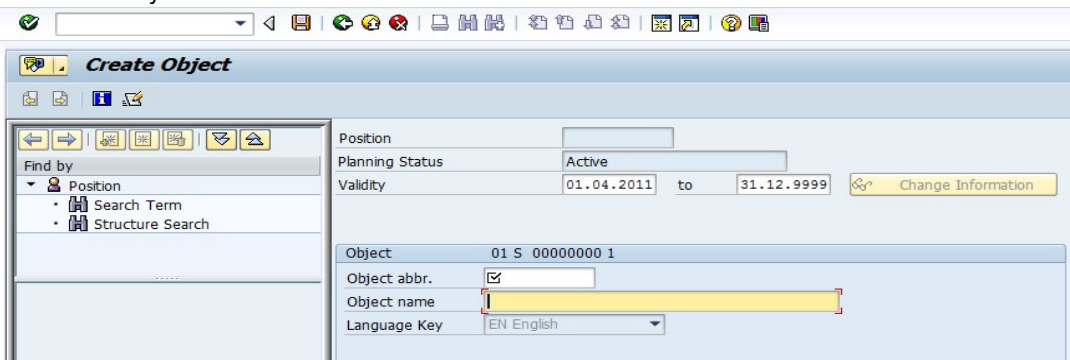

which will take you to next screen as shown below.

Select object tab as shown below and click create info type ⬜ or press (F5).


This will take you to next screen as shown below:

Be sure about the Validity periods. By default, system gives the begin date as current date and end date as 31.12.9999. Change the validity from to dates, then write Object abbr., Object name as shown below in the screen.
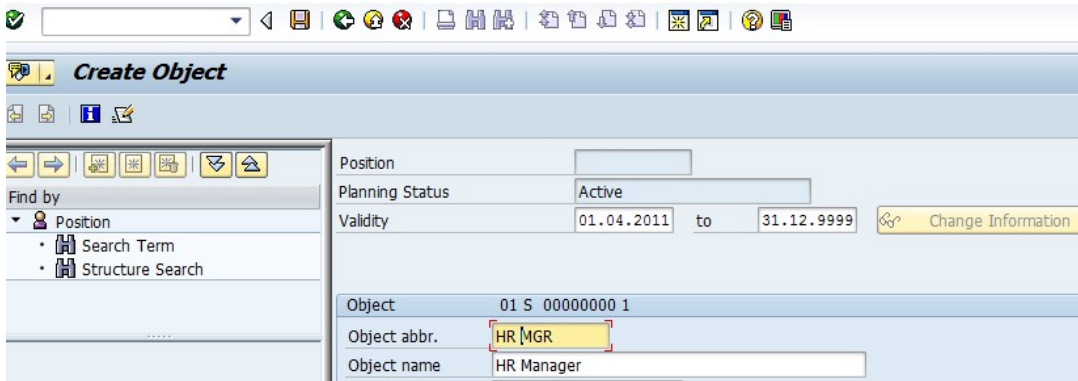
Then click save button. Message as "Proposal for planned relationship" will appear at the bottom of the screen. If you want you can create relationship with other organizational units as shown below or click to get out of the screen. Message as "Record created" will appear at the bottom:
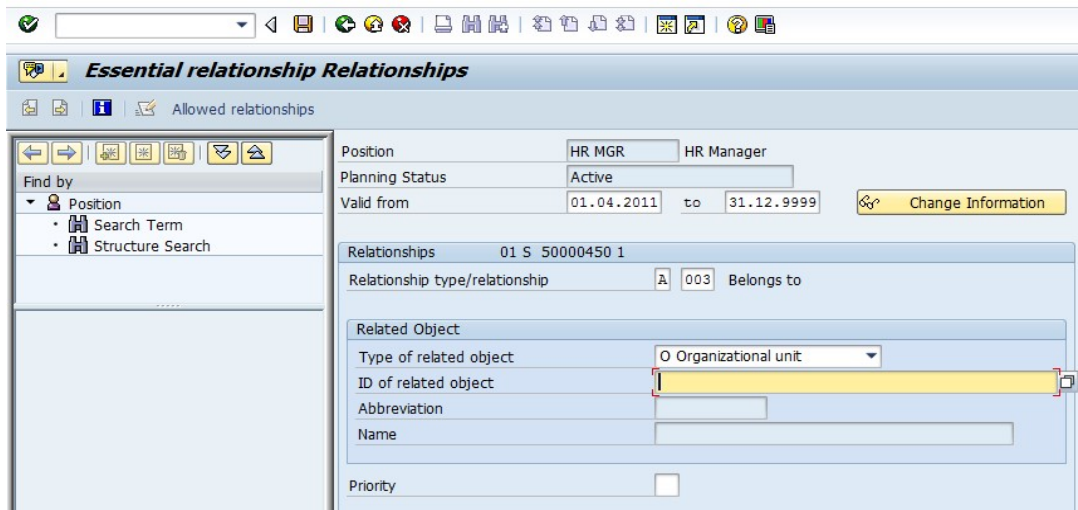

You must create relationship of the position with an organizational unit. In the relationships tab by clicking F4 or you will get Input help as shown in next screen.
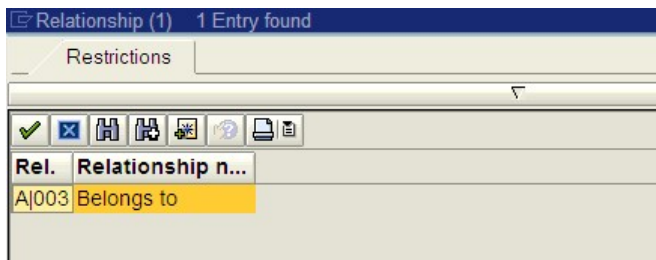
Choose the option tab and click , Then in Related object enter Type of related object by clicking F4 or , ID of related object by clicking F4 or as shown below:
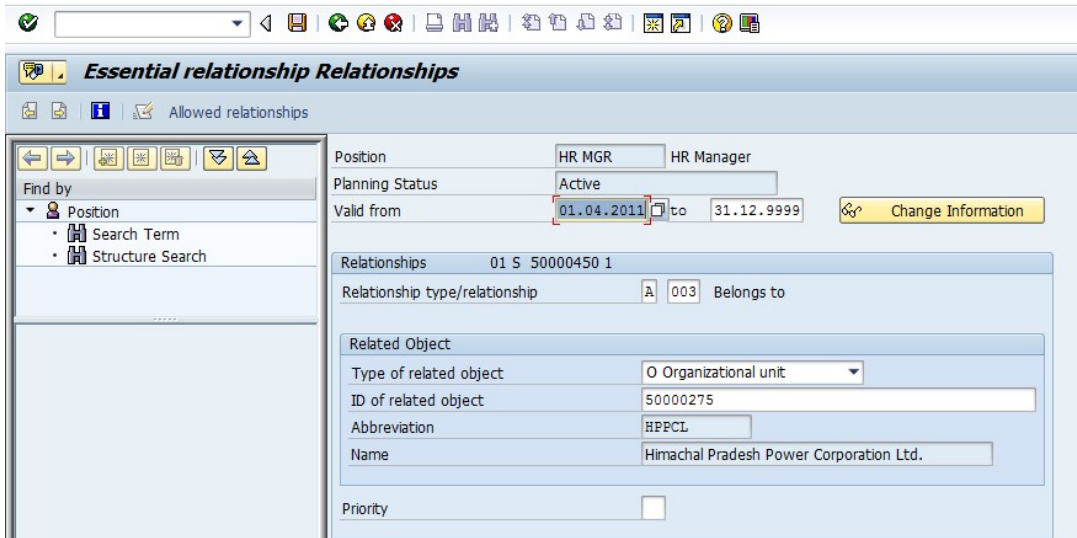
Then click save button 💾 "Record Created" message will appear at the bottom of the screen as shown below.
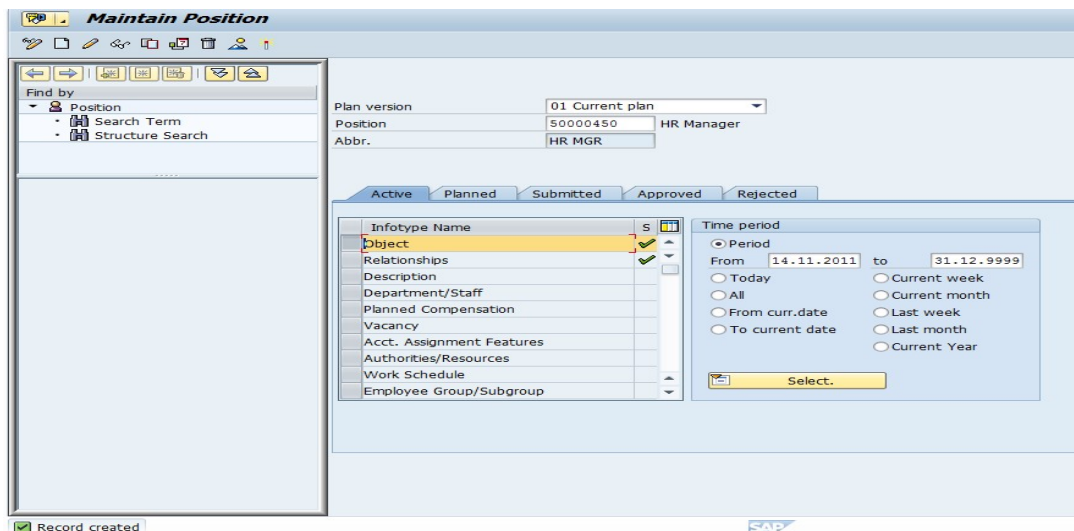
7.4 RESULT

You have created position in expert mode using the transaction code PO13.

7.5 COMMENTS

None.

8 DELIMIT POSITION

8.1 PURPOSE

Use this procedure to delimit position.

8.2 PREREQUISITES

Organizational units, jobs & positions are created.

8.3 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
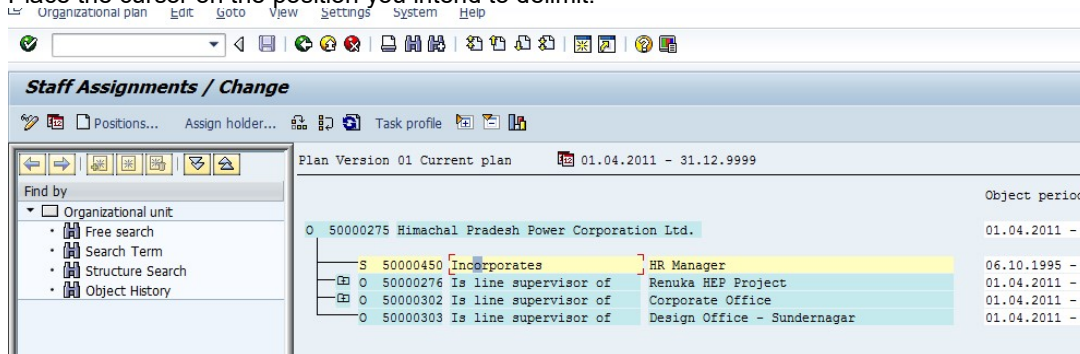- R – Required
- O – Optional
- C – Conditional

8.4 PROCEDURAL STEPS

Since the positions are created, the same has to be delimited:
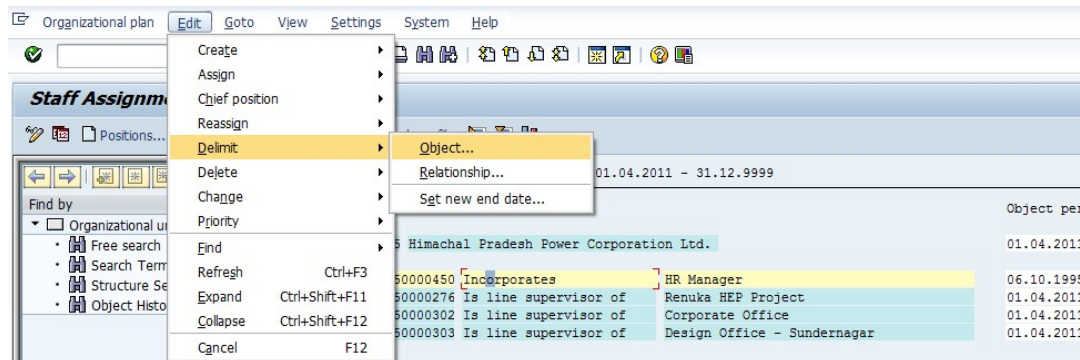
Step – I:

Place the cursor on the position you intend to delimit

Place the cursor on the position you intend to delimit.
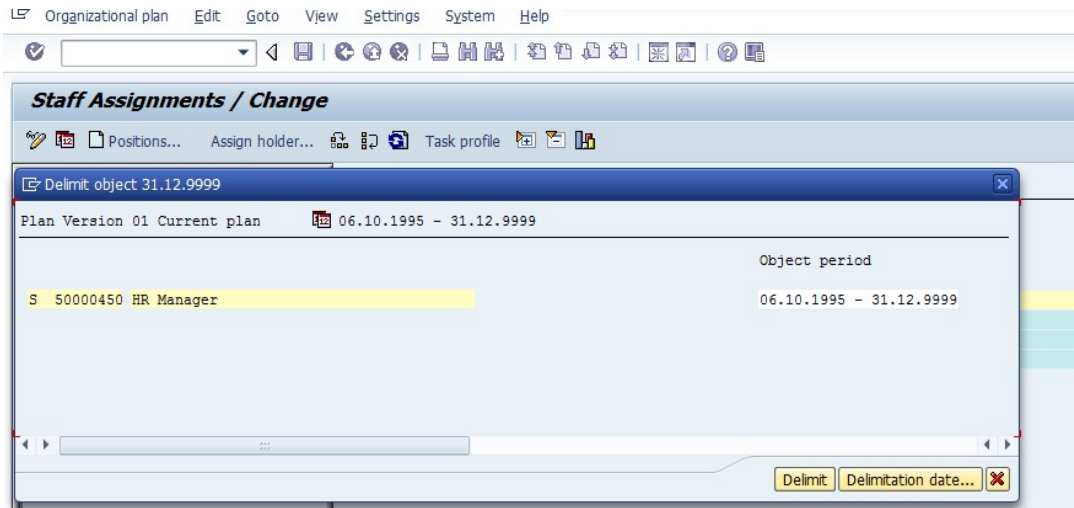

Step – II:

Click **Edit → Delimit → Object**

Step III:
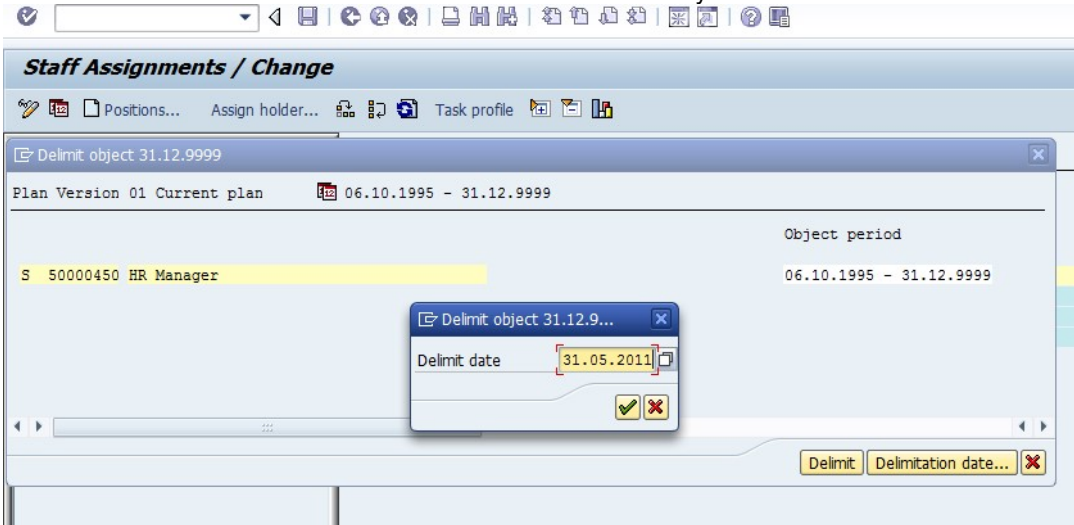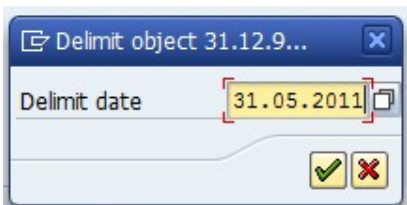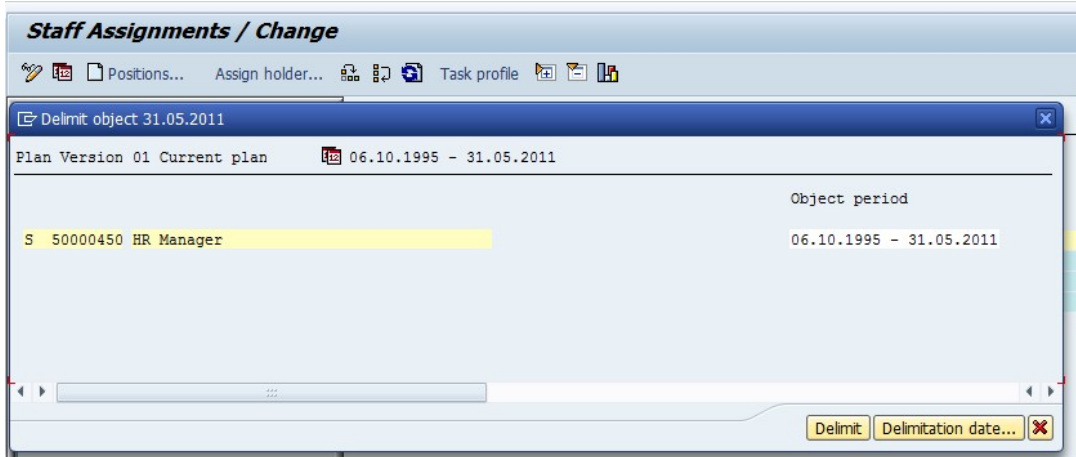Which will take you to next screen as shown below:

Step IV:

Click on the Delimitation date [Delimitation date...] which will take you to next screen as shown below:
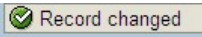

Delimit the object or change the date as below and click [✓] :

Step V: Then click Delimit button [Delimit] .

Message at the bottom will appear as Record Changed .

8.5 RESULT

You have delimited the position.

8.6 COMMENTS

None.

9   DISPLAY ORGANISATION UNIT

9.1 PURPOSE

Use this procedure to Display Organizational Unit in the system.

9.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

9.3 PROCEDURAL STEPS

Use the following menu path(s) to begin this transaction:
Select Human resources → Organization Management → Expert Mode → Simple Maintenance → Display or use Transaction code (PPOS_OLD).

Menu Path	**Human resources → Organization Management → Expert Mode → Simple Maintenance → Display or use Transaction code (PPOS_OLD)**
Transaction Code	**PPOS_OLD**

Start the transaction using the menu path or transaction code.
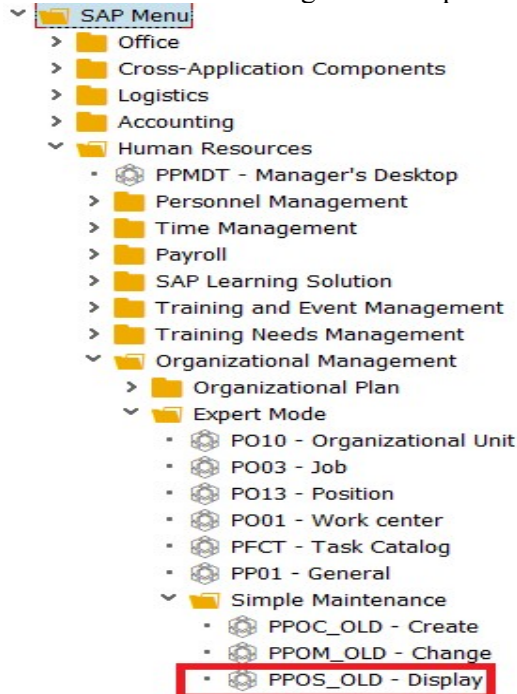
OR

2. Double-click ⬧ PPOS_OLD - Display to start the transaction or enter Transaction code in the command button as shown
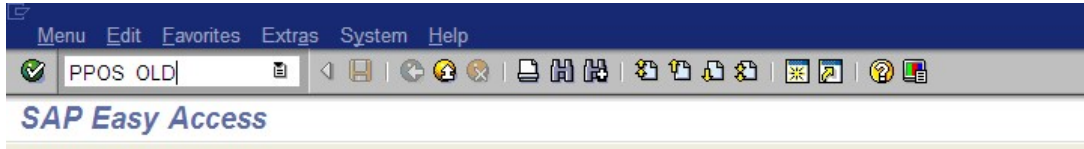
The same will take you to next screen as shown below:

Display Organizational Unit Initial Screen
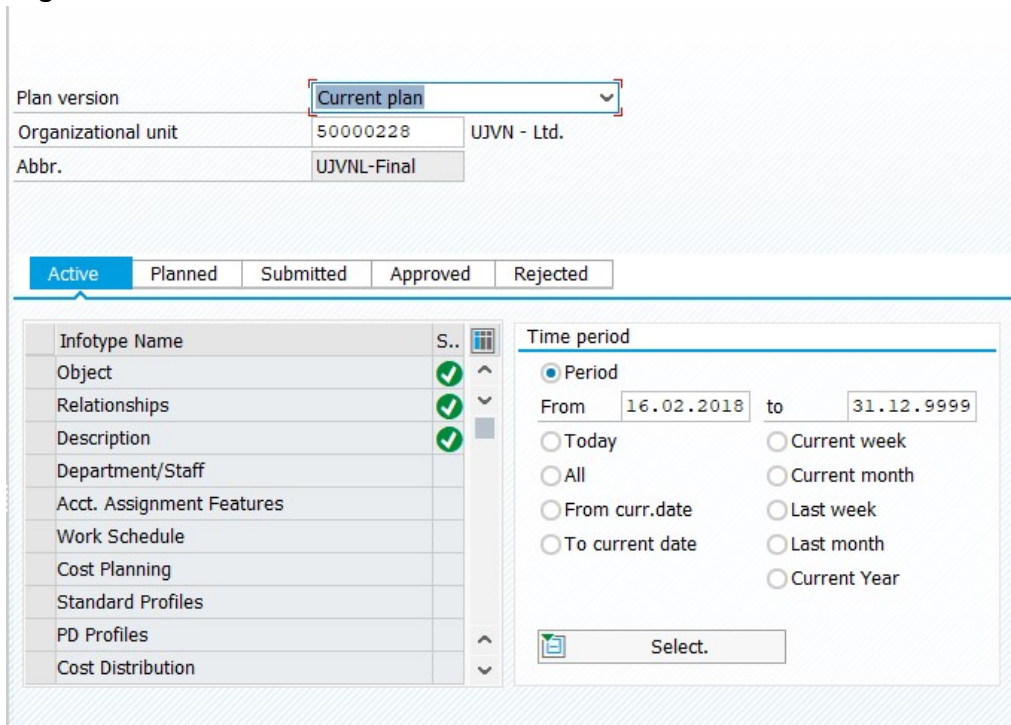
Fill the required information like Organizational Unit [   ] if you don't know

the organizational unit name or number, just type the first alphabet of the organizational unit attached with " * " as shown in next figure and press enter, This will take you to next screen as shown below :
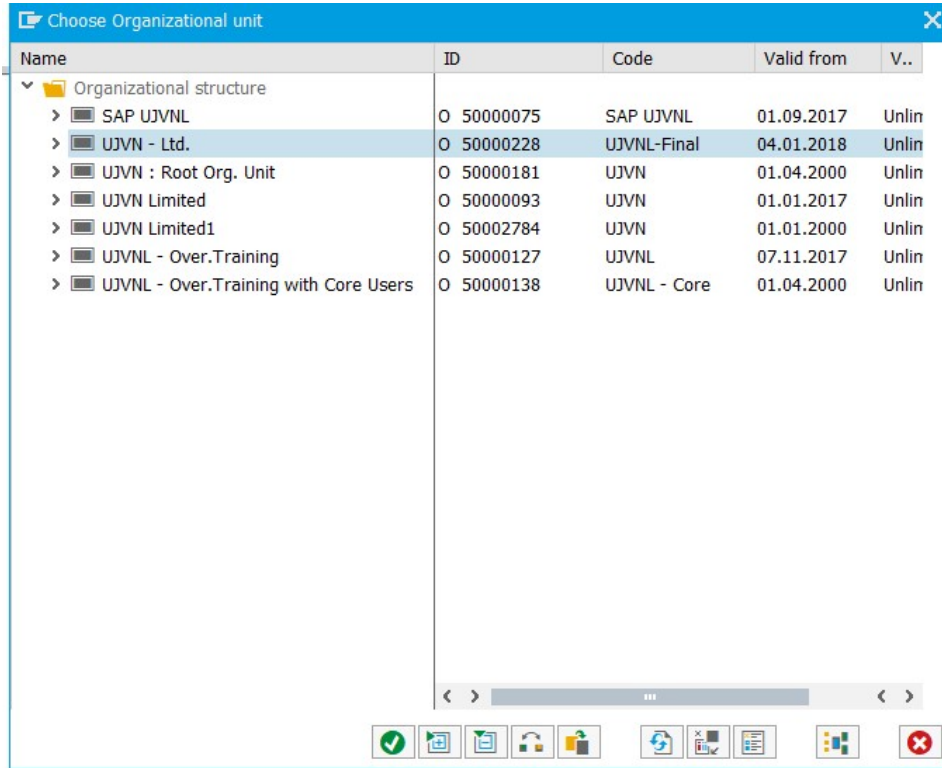
Choose the organizational unit you want to have the display and then press enter or click ☑. As soon as you enter or click the screen will show like this.
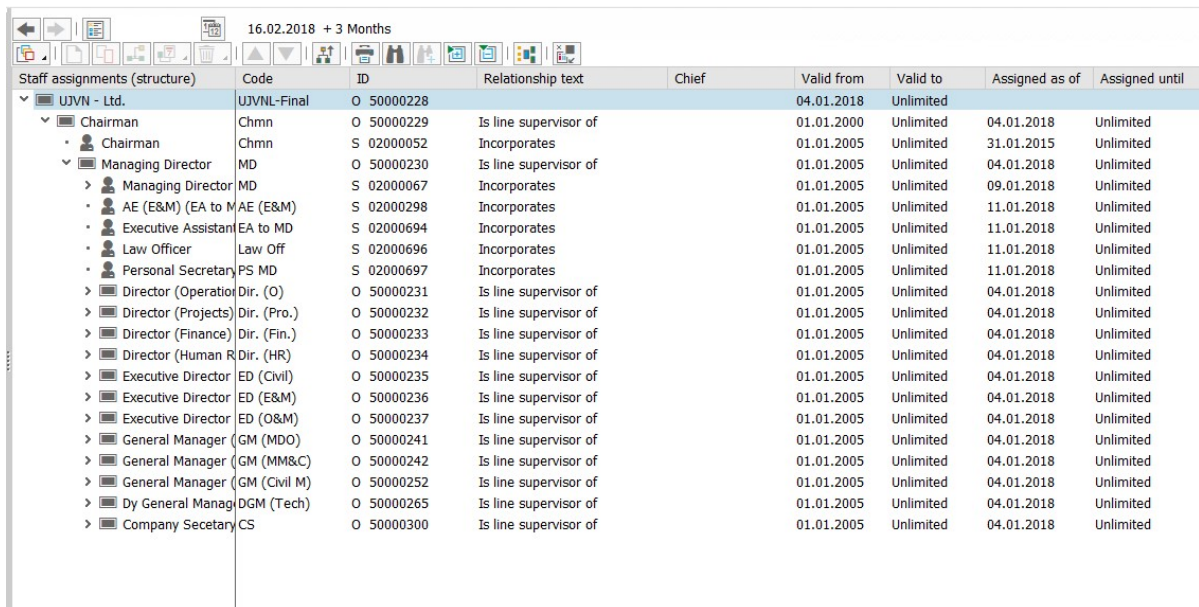
Click on Staff Assignments Icon to view the staff assignment. The system will display the screen as below:

```
Plan version 01 Current plan        01.01.2000 - 31.12.9999

UJVN - Ltd.
    └── Is line supervisor of      Chairman
            Incorporates           Chairman
        └── Is line supervisor of  Managing Director
                Incorporates           Managing Director
                Incorporates           AE (E&M) (EA to MD & CVO)
                Incorporates           Executive Assistant to MD
                Incorporates           Law Officer
                Incorporates           Personal Secretary to MD
                Incorporates           Personal Secretary to Dir(Operations)
                Incorporates           Personal Secretary to Dir(Projects)
                Incorporates           Personal Secretary to Dir(Finance)
            └── Is line supervisor of  Director (Operations)
                    Incorporates           Director (Operations)
                    Incorporates           Personal Secretary to Dir(Operations)
                    Incorporates           Section Officer
                    Is line supervisor of  Dy General Manager (IT)
                    Is line supervisor of  General Manager (Yamuna Valley)
                    Is line supervisor of  General Manager (Ganga Valley)
                    Is line supervisor of  General Manager (Bhagirathi Valley)
                    Is line supervisor of  General Manager (Ramganga and Sharda)
```
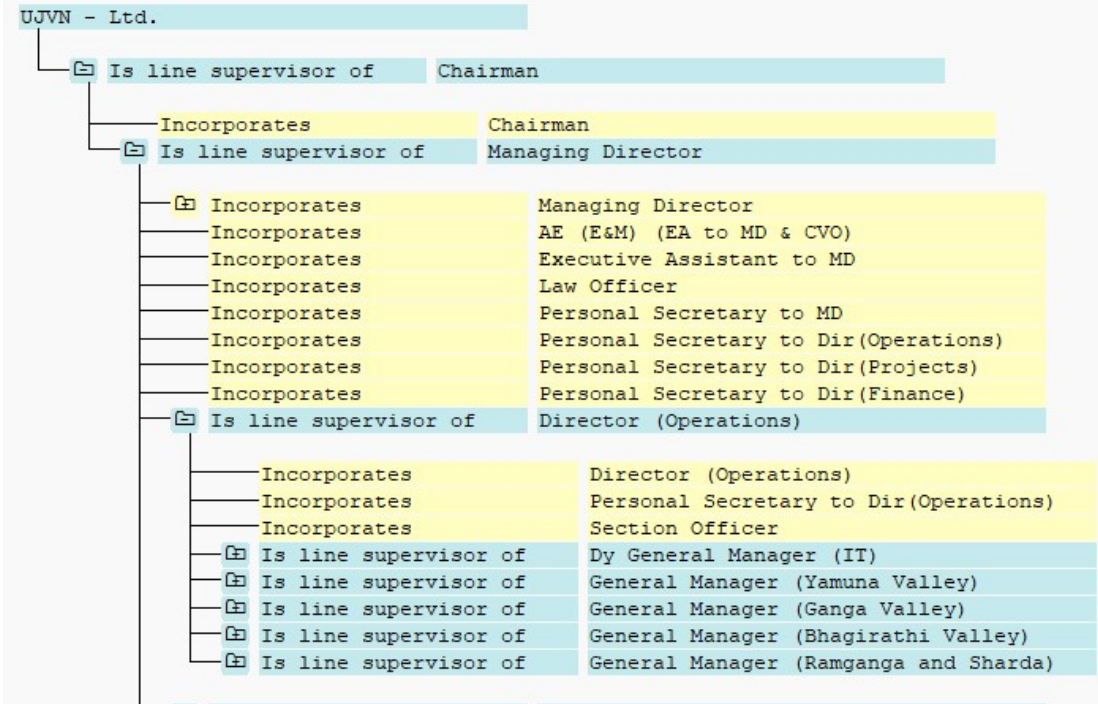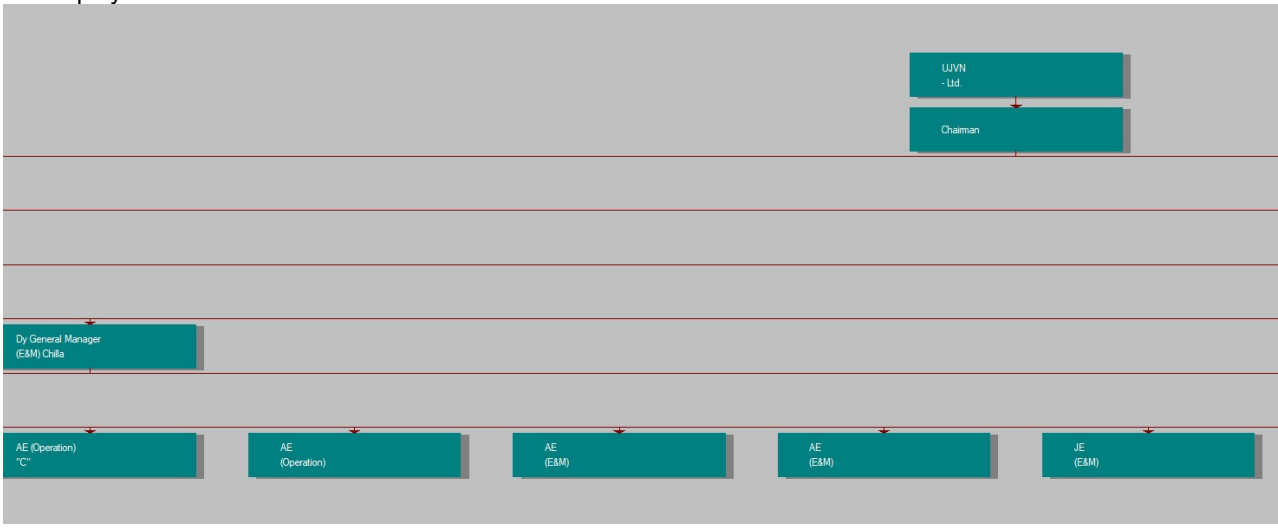
To view the graphical representation of the organization structure, click on Graphical display icon , The system will display the screen as shown below:

9.4 RESULT

You have display Organizational Unit in the system with Subordinate units and with Organizational unit number.

9.5 COMMENTS

None.