

HR505

Organizational Management

COURSE OUTLINE

Course Version: 15

Course Duration: 5 Day(s)

SAP Copyrights and Trademarks

© 2014 SAP SE. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE. The information contained herein may be changed without prior notice.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.

- Microsoft, Windows, Excel, Outlook, and PowerPoint are registered trademarks of Microsoft Corporation.
- IBM, DB2, DB2 Universal Database, System i, System i5, System p, System p5, System x, System z, System z10, System z9, z10, z9, iSeries, pSeries, xSeries, zSeries, eServer, z/VM, z/OS, i5/OS, S/390, OS/390, OS/400, AS/400, S/390 Parallel Enterprise Server, PowerVM, Power Architecture, POWER6+, POWER6, POWER5+, POWER5, POWER, OpenPower, PowerPC, BatchPipes, BladeCenter, System Storage, GPFS, HACMP, RETAIN, DB2 Connect, RACF, Redbooks, OS/2, Parallel Sysplex, MVS/ESA, AIX, Intelligent Miner, WebSphere, Netfinity, Tivoli and Informix are trademarks or registered trademarks of IBM Corporation.
- Linux is the registered trademark of Linus Torvalds in the U.S. and other countries.
- Adobe, the Adobe logo, Acrobat, PostScript, and Reader are either trademarks or registered trademarks of Adobe Systems Incorporated in the United States and/or other countries.
- Oracle is a registered trademark of Oracle Corporation
- UNIX, X/Open, OSF/1, and Motif are registered trademarks of the Open Group.
- Citrix, ICA, Program Neighborhood, MetaFrame, WinFrame, VideoFrame, and MultiWin are trademarks or registered trademarks of Citrix Systems, Inc.
- HTML, XML, XHTML and W3C are trademarks or registered trademarks of W3C®, World Wide Web Consortium, Massachusetts Institute of Technology.
- Java is a registered trademark of Sun Microsystems, Inc.
- JavaScript is a registered trademark of Sun Microsystems, Inc., used under license for technology invented and implemented by Netscape.
- SAP, R/3, SAP NetWeaver, Duet, PartnerEdge, ByDesign, SAP BusinessObjects Explorer, StreamWork, and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE in Germany and other countries.
- Business Objects and the Business Objects logo, BusinessObjects, Crystal Reports, Crystal Decisions, Web Intelligence, Xcelsius, and other Business Objects products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Business Objects Software Ltd. Business Objects is an SAP company.
- Sybase and Adaptive Server, iAnywhere, Sybase 365, SQL Anywhere, and other Sybase products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Sybase, Inc. Sybase is an SAP company.








All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary.

These materials are subject to change without notice. These materials are provided by SAP SE and its affiliated companies ("SAP Group") for informational purposes only, without representation or warranty of any kind, and SAP Group shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP Group products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	<i>Example text</i>
Window title	<i>Example text</i>

VLC About This Handbook

About This Handbook

This handbook provides you with basic information for attending your virtual live classroom session.

Adobe Connect Support Information

Web and audio support is available by:

- Pressing *0 from within the audio-conferencing
- Calling the support hotline numbers listed below
- Emailing the PGI support hotline below

Global PGI Support Hotline for SAP Education (24/7)

Tel: +1 800-368-1945

Tel: +1 719-234-7915

Note: After dialing in, press option 2 for technical support. You will then be presented with two options – press 1 for Audio support, or press 2 for Web support.

Email: sapedsupport@premierglobal.com

Setting up your Learning Environment

Ideally you want to be in a private room when participating in a synchronous (live) event. In reality, you may not be able to arrange that. Here are some tips for maximizing your learning environment:

- Create an inspirational office/studio to work in
- Use a comfortable chair
- Use well designed and functional computer peripherals
- Keep a log or journal of notes and ideas you can use for future sessions

Before your online class:

- Tell co-workers you will be in class (send e-mail)
- Post a sign indicating when you will be free again (when class is over)
- Use a headset instead of your computer speakers to minimize disruption of others
- Ignore people who try to get your attention
- Turn off the ringers / alerts on telephone, pager, and cell phone
- Turn off e-mail and instant message alerts
- Remove other distractions lying on your desktop
- Keep a glass of water at your desk

Teleconferencing ground rules:

- Use the mute button or press *6
- Do not place call on hold

- Use the "Raise hand" icon in the Attendee List: My Status to indicate you want to ask a question
- Identify yourself before speaking, when not called on
- Charge the batteries for your cordless handset
- If possible use a land line instead of your cell phone

Minimum Hardware Requirements

- PC with 1.4 GHz processor or higher (Windows) or 1.83 GHz process or higher (Mac OS). Minimum processor required for screen sharing. You may be asked to share your screen during hands-on exercise portions of the class.
- 17 inch or larger monitor is recommended, set at 1024 X 768. Larger monitor and 1024 X 768 setting will make presentation and system screens easier to read.
- Phone with Headset/Microphone or Speakerphone feature – to maximize student listening and comfort during presentation and demonstration portions of the course.

Software Requirement

A complete list of supported Operating Systems, browsers and additional requirements for Adobe® Acrobat® Connect™ can be found at: www.adobe.com/products/acrobatconnectpro/systemreqs

Sample Email to Notify Others You Are in a Virtual Class

This is a sample of an email you can send to your colleagues and manager when you are taking an online course.

Dear colleagues,

Today I will be participating in an online class from my desk. I will be online from approximately 9:30 a.m. to 5:30 a.m. EST. I would appreciate it if you would not disturb me during this time. If you have an immediate question, please contact Joe Smith at extension 123. If it can wait until after 11:00 a.m., please send me an email and I will follow up with you before the end of the business day. I appreciate your consideration.

Best regards,

Getting the Most Out of Your Session

Session Guidelines

- Turn off email, phones, instant messaging tools, and clear other distractions away from your training area.
- Participate and prepare to be called on by name.
- Use the "Raise Hand" icon if you have an immediate question or comment.
- Be patient waiting for a response to your chat messages.
- If you leave the program, please use the "Step Away" status icon in the Attendee List pod to let your instructor know when you leave and remember to clear it when you return.

Contents

xi	Course Overview
1	Unit 1: Organizational Management Structures
1	Lesson: Outlining Organizational Management (OM) Basics
3	Unit 2: Organizational Management Concepts
3	Lesson: Outlining Organizational Management Concepts
3	Lesson: Finding Object Relationships
3	Lesson: Planning Options in Organizational Management
5	Unit 3: Organization and Staffing Framework
5	Lesson: Identifying the Organizational Plan
5	Lesson: Updating the Organizational Structure
7	Unit 4: Expert Mode in Organizational Management
7	Lesson: Maintaining Infotypes
9	Unit 5: Simple Maintenance in Organizational Management
9	Lesson: Maintaining Organizational Plans Using Simple Maintenance
11	Unit 6: General Structures and Matrix Organizations
11	Lesson: Maintaining General Structures
11	Lesson: Maintaining Matrix Organizations
13	Unit 7: Integration in Organizational Management
13	Lesson: Setting Up Integration Switches
13	Lesson: Loading OM Files
15	Unit 8: Self-Services in Organizational Management
15	Lesson: Updating Information Using Manager's Desktop (MDT)
15	Lesson: Updating Information Using Manager Self-Service (MSS)
17	Unit 9: Data Model Enhancements in Organizational Management
17	Lesson: Outlining the OM Data Model
17	Lesson: Modifying the Data Model
17	Lesson: Creating Relationships
17	Lesson: Creating Evaluation Paths

19 Unit 10: Hierarchy Framework in Organizational Management

- 19 Lesson: Customizing the Hierarchy Framework of the Organization and Staffing interface
- 19 Lesson: Defining Search Nodes
- 19 Lesson: Outlining Column Groups
- 19 Lesson: Customizing the Structural Overview

21 Unit 11: Evaluations and Reports in Organizational Management

- 21 Lesson: Describing Structural Reports
- 21 Lesson: Executing Standard Delivered Reports

23 Unit 12: Case Study Organizational Structure Setup

- 23 Lesson: Setting Up an Organizational Structure

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant
- Business Process Owner/Team Lead/Power User
- Data Consultant/Manager

Lesson 1: Outlining Organizational Management (OM) Basics

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the setup and interfaces of the OM component
- Outline the integration between OM and other components

Lesson 1: Outlining Organizational Management Concepts

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the basic object types in OM

Lesson 2: Finding Object Relationships

Lesson Objectives

After completing this lesson, you will be able to:

- Find object relationships used to depict the organizational structure

Lesson 3: Planning Options in Organizational Management

Lesson Objectives

After completing this lesson, you will be able to:

- Confirm the setup of plan versions to enable organizational planning
- List object characteristics to ensure appropriate associations are set up

Lesson 1: Identifying the Organizational Plan

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the setup of the organizational plan

Lesson 2: Updating the Organizational Structure

Lesson Objectives

After completing this lesson, you will be able to:

- Modify the organizational structure by creating organizational objects
- Assign objects to the existing organizational structure

Lesson 1: Maintaining Infotypes

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain infotypes to modify the setup of the organizational structure using the Expert mode interface
- Evaluate the functions for maintaining the organizational structure
- Maintain organizational management infotypes

Lesson 1: Maintaining Organizational Plans Using Simple Maintenance

Lesson Objectives

After completing this lesson, you will be able to:

- Set up an organizational structure using Simple Maintenance

Lesson 1: Maintaining General Structures

Lesson Objectives

After completing this lesson, you will be able to:

- Set up the organizational structure using the General Structures interface
- Maintain evaluation paths to link objects in the organizational structure

Lesson 2: Maintaining Matrix Organizations

Lesson Objectives

After completing this lesson, you will be able to:

- Create multiple reporting structures with matrix organizations

Lesson 1: Setting Up Integration Switches

Lesson Objectives

After completing this lesson, you will be able to:

- Set up integration settings
- Hire an employee and test the integration between OM and PA

Lesson 2: Loading OM Files

Lesson Objectives

After completing this lesson, you will be able to:

- Download and upload OM files from a spreadsheet

Lesson 1: Updating Information Using Manager's Desktop (MDT)

Lesson Objectives

After completing this lesson, you will be able to:

- Update the organizational structure using MDT

Lesson 2: Updating Information Using Manager Self-Service (MSS)

Lesson Objectives

After completing this lesson, you will be able to:

- Update position information using MSS

Lesson 1: Outlining the OM Data Model

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the OM data model to enable consistent data creation

Lesson 2: Modifying the Data Model

Lesson Objectives

After completing this lesson, you will be able to:

- Add objects to an organizational structure

Lesson 3: Creating Relationships

Lesson Objectives

After completing this lesson, you will be able to:

- Create relationships between objects to accurately depict the organizational structure

Lesson 4: Creating Evaluation Paths

Lesson Objectives

After completing this lesson, you will be able to:

- Create evaluation paths to facilitate reporting on organizational structures

Lesson 1: Customizing the Hierarchy Framework of the Organization and Staffing interface

Lesson Objectives

After completing this lesson, you will be able to:

- Customize the object manager

Lesson 2: Defining Search Nodes

Lesson Objectives

After completing this lesson, you will be able to:

- Add search nodes to the structure to enable customized searches

Lesson 3: Outlining Column Groups

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the configuration of column groups and ensure appropriate screen views are available

Lesson 4: Customizing the Structural Overview

Lesson Objectives

After completing this lesson, you will be able to:

- Customize the overview of objects on the *Organization and Staffing* interface by using structural overview objects

Lesson 1: Describing Structural Reports

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the structural reporting functionality

Lesson 2: Executing Standard Delivered Reports

Lesson Objectives

After completing this lesson, you will be able to:

- Execute standard delivered reports

Lesson 1: Setting Up an Organizational Structure

Lesson Objectives

After completing this lesson, you will be able to:

- Set up and verify an organizational structure configuration