Organizational Plan in Workflows

Applies to:

SAP BUSINESS WORKFLOW.

Summary

Organizational Planning & staffing leads to create the basic framework of your organizational plan in order to reflect the structure and HR environment of your enterprise, using this we create jobs, positions, user, Tasks through the transaction PPOCW. This leads to a complete view of an organizational structure, which will be useful before we create an organizational plan through workflow builder. Organizational plan is mainly used as Reporting structure for approval process in an organization.

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Organizational Plan
An organizational plan describes how an employee is assigned within the organization. You can store the employees who are responsible for carrying out individual business activities in your organizational plan. The organizational plan is maintained for specific clients in the Organizational Management component. An organizational plan created for HR purposes can also be used in SAP Business Workflow as long as the workflow functionality and the HR application are in the same client. An organizational plan consists of the organizational units that exist in the company. The organizational units are related to each other in a hierarchical reporting structure. However, they can also be created independently of each other.

To create a new organizational plan, you create a root organizational unit. This is the highest unit within the organizational plan (for example, Board of Directors).

**Organizational plan structure**

Organizational plan consists of several features they are:

- **Position**
- **Job**
- **User**
- **Task**

1. **Position**
   It represents a post that can be a person (employee in an organization) in the staff assignment of an organizational unit, e.g. Sales Manager. Positions are concrete in nature, held by persons in an enterprise.

2. **Job**
   It is a resource for creating positions, jobs differ from positions. They are not concrete in nature. Jobs serve as job descriptions that apply to several positions with similar tasks or characteristics.

3. **User**
   Login ID of a user. Users are maintained in User Maintenance.

4. **Task**
   Description of an activity in organizational management, like which user has given which task, how many task were involved in that.

**Organization and Staffing:**

Organization plan is achieved through organization and staffing (workflow). It is used to create, view, edit and display the organization plan. Organization and staffing screen consists four main screen areas:

1. **Search Area:**
   In search area you can choose between different object types. Depending on our search criteria different objects were offered on organization and staffing (workflow) view.

2. **Selection Area:**
   In Selection area list of object types were displayed depending on our search, by double clicking the object it is displayed in the overview area. It is used extensively for assigning purposes.

3. **Overview Area:**
   It displays selected object including its environment and used to select another object.

4. **Detail Area:**
   It displays the characteristics of selected object like hide, enlarge also we can edit the characteristics of the selected object.

**Procedure to Create an Organization Plan**

**Requirement:**
A company named XYZ has a business all over the world; it consists of several departments like sales & marketing, production planning, purchasing, shipping, finance & control. Now we are developing an organization plan through organization and staffing (workflow) model.

1. **Creating Root Organizational Unit:**
   First we create Root Organizational Unit (i.e. XYZ limited), after that we will create subordinate organizational units like sales & marketing, production planning etc.

(Or)

You can use the transaction PPOCW directly.

It will take you to the Validity dialog box, nothing but it will ask us to confirm the proposed validity of this particular Root Organizational Unit.
This screen consists of 4 areas which were specified earlier.

In the Detail Area enter the name & abbreviation of the new organizational unit under the Basic Data tab i.e. XYZ_ORG

Save the new organization unit. New organization unit with name is displayed at the Overview Screen. After that click GOTO icon which is present at the left most corner of the Overview Screen.
GOTO -> choose (Organizational Structure)

**Organization and staffing (workflow) Create**

Then just right click at the organization plan and choose create. This will create new organizational units under XYZ organization.

It will take you to another screen, on that enter your sub-organizational unit i.e. sales & marketing. On the Basic Data tab of the detail area, enter your organizational unit name and its abbreviation.
E.g. xyz_org_S&M Sales & Marketing (xyz)

Here Sales & Marketing (xyz) represents sub-organizational unit under XYZ.

Xyz_org_S&M represents abbreviation of Sales & Marketing.
Just save it, new organizational unit will be created. Likewise we create for Production Planning, Purchasing, Shipping, Finance & Controlling etc.

5 new organizational units have been created under the Root Organizational Unit XYZ.

2. Creating Staff assignments:
The staff assignments for each organizational unit are maintained. The organizational unit is assigned positions in these staff assignments. A position is derived from descriptive job and assigned to one or more users in a company.
We have created XYZ as root organizational unit and its sub-unit as per the requirement.
Now we need to assign Position, Job, User, Tasks for every organizational unit.
This can be achieved through transaction PPOMW (Or) choose -> Business Workflow -> Development -> Definition Tools -> Organizational Management -> Organizational Plan -> Change.
Now search your organizational unit in Search area by selecting the search term and give (xyz) as hint. Organizational Unit XYZ is displayed in Selection Area. Double click the organizational plan (xyz). It will be displayed at the Overview screen.
3. Creating Jobs:
We need to create jobs for every organizational unit.
Choose Edit -> Create Jobs
The dialog box Create jobs is displayed. The lower area contains a list of existing jobs and the upper area contains an input table in which you can create new jobs by entering abbreviations and names. We first enter Jobs for Sales & Marketing Respectively, some of the Jobs are sales admin, sales manager etc. Enter this in input table for sales admin job. Xyz_sa_C: object abbreviation. Sales Admin: Job Name. This Specification has been represented in the above screen. Likewise we create all other jobs for Sales & Marketing. 4. Creating Positions: Now we need to assign staff assignment (position), in order to do this Select Sales & Marketing Unit by clicking, a yellow line appears above the selected unit and then choose GOTO icon -> staff assignment list. Next click on the Assign icon on the Overview Screen, new position is displayed at the Detail Screen. Enter the new position name with abbreviation like this Position: Sales Marketing Head Abbreviation: xyz_smh_S_sm Let us consider that Sales Marketing Head is the Head of the Sales & Marketing unit, This can be achieved through by clicking the Head of own organization unit check box present in the detail area. And save it. Like wise we create sales manger, promotion manager etc by following the same procedure. Chief position (Head) in the unit is marked with Red icon. Now we need to define our organizational structure. Choose GOTO icon in the Overview area. It will bring you to the Sales & Marketing Unit.
Choose One Level Up icon in the Overview area for editing the root organizational unit.

5. Assigning Jobs to Positions:
We have Created Positions for Sales & Marketing also complete organization structure, now we need to match each position with corresponding job. This can be done similar way we created position.
Display your created position in the selection area. Choose the entry Position in the search area and enter the abbreviation you used (xyz) as the search term.
All positions created in this unit are displayed in the selection area.
Select the Sales Marketing Head (xyz) sm for editing by double-clicking.
The position and the organizational objects assigned to you (job, organizational unit) are displayed in the overview area.
Display your created job in the selection area. Choose the entry job in the search area and enter the abbreviation you used (xyz) as the search term.
All jobs created in this unit are displayed in the selection area.
Select the job Sales Marketing Head (xyz) in the selection area.
Drag the job to the position in the overview area and choose save.
Repeat the same steps to assign jobs to various positions in Sales & Marketing.

6. Assigning Users to Positions:
When ever you assign users to positions, you define the holders of these positions.
You can assign user to the position in single processing of a position. In this case we assign Trainee ID as user. User can be assigned by clicking the assign icon in overview area.

Following screen shot explains the process. After this we get assigned user details of the Sales Head Position.

Users can occupy a position either in full or in part. This depends on the working hours assigned to the position. Like wise we assign users to each position in Sales & Marketing.

7. Assigning Task:
Tasks will be created through separate transaction.
Choose Tools -> Business Workflow -> Definition tools -> Tasks/Task groups -> create.
This can be achieved through single transaction: PFTC_INS

It will take you to the below screen then choose Standard task

![Task: Maintain](image)

Here SV stands for Sales Volume, that's the main task for Sales Head.
Click the Create icon.

It will take you to another screen; here enter the description for respective task.

Now task is created. After this enter PPOMW transaction to assign a task to respective position.
Navigate in the detail view of a job, position, or organizational unit to which you want to assign a task. Open the detail view of the position head of department (xyz) Sales & Marketing.
In the selection area, display the tasks or workflows that you want to assign to the position. In the search area, choose Standard Task and use a suitable search term.
Select the task to be assigned and drag it to the task assignment for the position.
Choose save.
Following Screen shot Explains Clearly.
Now task has been created successfully.
Detailed Description of Sales & Marketing Unit:
Like wise we create job, user, task for Sales Manager, Promotion Manager, Sales Executive and Sales Clerk. Now Sales & Marketing Unit's requirement were fulfilled.

Complete Organizational Structure is given below:
Summary:
Organizational Planning & staffing leads to create the basic framework of your organizational plan in order to reflect the structure and HR environment of your enterprise, using this we create jobs, positions, user, Tasks through the transaction PPOCW. This leads to a complete view of an organizational structure, which will be useful before we create an organizational plan through workflow builder. Organizational plan is mainly used as Reporting structure for approval process in an organization.

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