

Organizational Unit_Create

Purpose Use this procedure to create an Organizational Unit and its attributes.

Trigger Perform this procedure when a new Organizational Unit (department, division, project, etc.) must be created.

- Prerequisites**
- Highest level Organizational Unit must exist.
 - Cost Center must exist.

End User Roles In order to perform this transaction you must be assigned the following role:

- Organizational Management Processor




Change History	
Date	Change Description
5/12/2009	Procedure created.







- Menu Path**
- Human Resources → Organizational Management → Tools → Object → Actions

Transaction Code **PP03**

Helpful Hints n/a

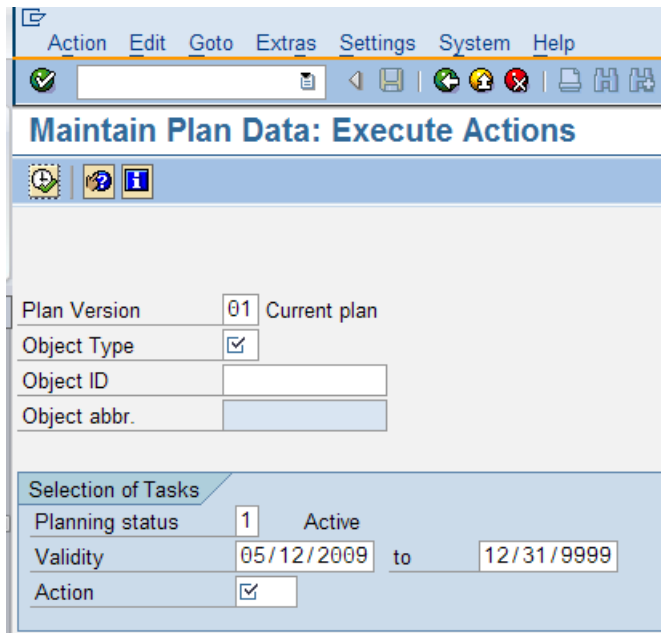
Types of Messages The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. <i>Action:</i> Fix the problem(s) and then click  (Enter) to proceed.

<p>Warning </p>	<p>Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.</p>
<p>Confirmation  or </p>	<p>Example:  Save your entries. Action: Perform the required action to proceed.</p>

Procedure

Start the procedure using the transaction code **PP03**.





The screenshot displays the SAP 'Maintain Plan Data: Execute Actions' interface. At the top, there is a menu bar with 'Action', 'Edit', 'Goto', 'Extras', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Maintain Plan Data: Execute Actions' and contains several input fields and checkboxes:

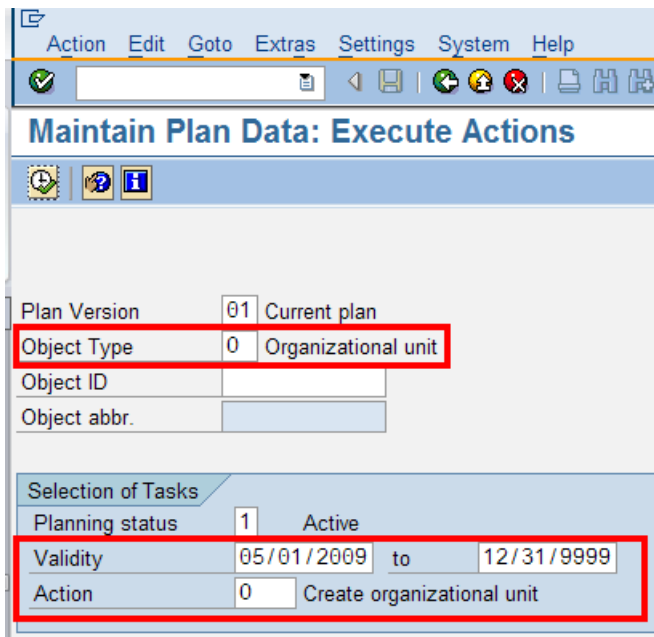
- Plan Version: Current plan
- Object Type:
- Object ID:
- Object abbr.:

Below these fields is a section titled 'Selection of Tasks' with the following settings:

- Planning status: Active
- Validity: to
- Action:

1. As required, complete/review the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Object Type	R	The type of object being created.  Reference the Organizational Management Job Aids for a list of all Object Types. Note: Org Units and Positions are the only object types used for transactions PP03. Example: O (Organizational Unit)
Object ID	n/a	This is the system-assigned number of an object type.  <u>This field should remain blank when creating an Org Unit.</u>
Validity	R	The validity period is defined as beginning on the start date and ending on the end date. Example: 05/01/2009 to 12/31/9999
Action	R	This groups infotypes according to the type of action you are performing. Example: O Create Organizational Unit



Maintain Plan Data: Execute Actions

Plan Version Current plan

Object Type Organizational unit

Object ID


Object abbr.

Selection of Tasks



Planning status Active

Validity to

Action Create organizational unit

2. Click  (Execute) to execute the action.

3. As required, complete/review the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Object abbr	R	The abbreviation of the Organizational Unit name.  There is a maximum of 12 characters. Example: ND00 (This is agency specific)
Object name	O	The name of the Organizational Unit.  There is a maximum of 40 characters. Example: New Department (This is agency specific)

Infotype Edit Goto View System Help

Essential relationship Object

Organizational unit

Planning Status


Validity to

Object 01 O 00000000 1

Object abbr.

Object name

Language Key

4. Click  (Enter) to validate the information.

5. Click  (Save) to save.

Infotype Edit Goto Extras View System Help

Essential relationship Relationships

Allowed relationships

Organizational unit NEW DEPARTMENT

Planning Status

Valid from to

Relationships 01 O 31000125 1

Relationship type/relationship Reports (line) to

Related Object

Type of related object Organizational unit



ID of related object

Abbreviation


Name


Priority

6. As required, complete/review the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
ID of related Object	R	<p>*This is the system-assigned number of the Organizational Unit that you would like the new Organizational Unit to report to.</p> <p> Use the  (Matchcode) and perform a Structure Search if you do not know the original Object ID.</p> <p>Example: 31000031 Santos Training School</p>



*This description is specific to this procedure.

 This establishes the Organizational Unit to Organizational Unit relationship.


7. Click  (Enter) to validate the information.

8. Click  (Save) to save.

9. As required, complete/review the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
ID of related Object	R	<p>*This is the system-assigned number of the Cost Center to which the new Organizational Unit is assigned to.</p> <p> Use the  (Matchcode) and perform a search by Cost Center if you do not know the original Object ID.</p> <p>TIP: Start the search with your agency code and the wildcard symbol (*). (e.g. 111*)</p> <p>Example: 31000031Santos Training School</p>

*This description is specific to this procedure.

 This establishes the Organizational Unit to Cost Center relationship.

Infotype Edit Goto Extras View System Help

Essential relationship Relationships

Allowed relationships

Organizational unit ND00 NEW DEPARTMENT
 Planning Status Active
 Valid from 05/01/2009 to 12/31/9999 Change Information

Relationships 01 O 31000125 1
 Relationship type/relationship A 011 Cost center assignment

Related Object

Type of related object	K Cost center
ID of related object	1110000000WA01
Abbreviation	DEFAULT AGEN
Name	DEFAULT AGENCY 111

Priority

10. Click (Enter) to validate the information.
11. Click (Save) to save.
12. Review the Essential relationship Relationships infotype. Information is defaulted in based on the data provided on the previous infotype.

Infotype Edit Goto Extras View System Help

Essential relationship Relationships


Organizational unit ND00 NEW DEPARTMENT
 Planning Status Active
 Validity 05/01/2009 to 12/31/9999

Key fields for cost center


Cost Center	1110000000	DEFAULT AGENCY 111
CO Area	WA01	Washington State




Do not enter information on this infotype and proceed to next step to Save.


13. Click  (Save) to save.
Note: If this infotype is not saved, the position will not be funded through Financials.

14. Perform one of the following:

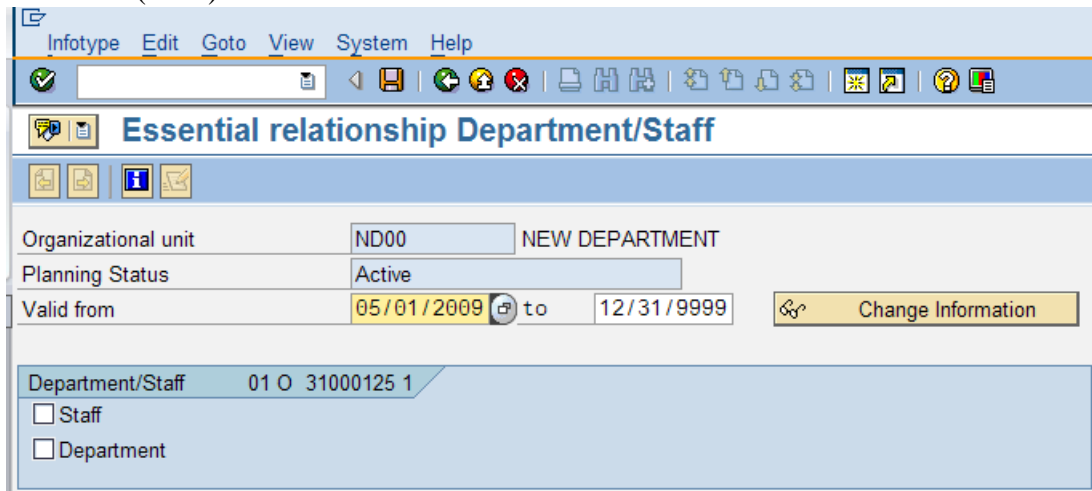
If	Go To
You do not have the general description for the Organizational Unit, click  (Cancel) AND	Step 18
You have the general description,	Step 15

15. As required, complete/review the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Subtype	O	This is a way to further define the data being stored on an infotype. Only certain infotypes have subtypes.  Only choose the General Description when created organizational unit. Example: General Description
Description	O	This is a field that defines specific attributes of a position or an organizational unit. Example: This is agency specific.

16. Click  (Enter) to validate the information.

17. Click  (Save) to save.




Infotype Edit Goto View System Help

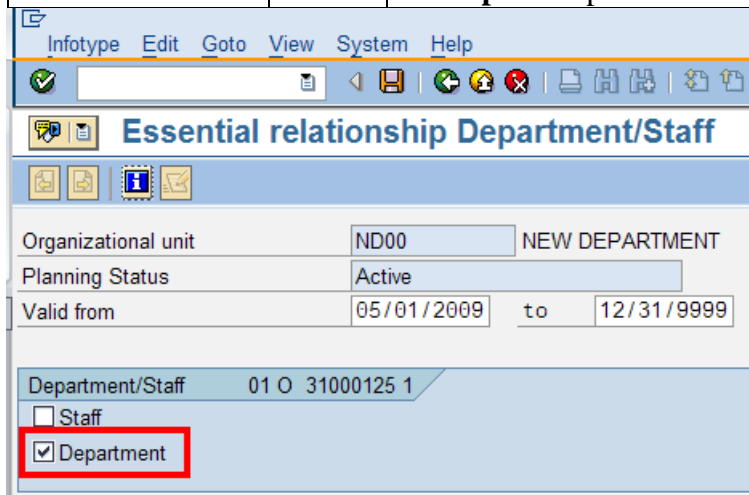
Essential relationship Department/Staff

Organizational unit: ND00 NEW DEPARTMENT
 Planning Status: Active
 Valid from: 05/01/2009 to 12/31/9999

Department/Staff: 01 O 31000125 1
 Staff
 Department

18. As required, complete/review the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Department	R	This indicates whether or not the organizational unit is a department or staff.  You will always check department. Note: If not checked, the new organizational unit will not appear in Business Intelligence. Example: Department





Infotype Edit Goto View System Help

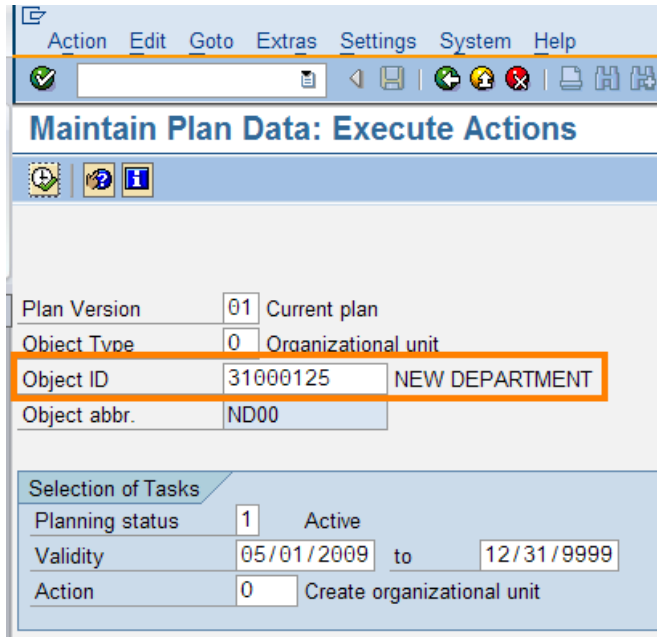
Essential relationship Department/Staff

Organizational unit: ND00 NEW DEPARTMENT
 Planning Status: Active
 Valid from: 05/01/2009 to 12/31/9999

Department/Staff: 01 O 31000125 1
 Staff
 Department

19. Click  (Enter) to validate the information.

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- 20. Click  (Save) to save.
 - 21. Once you have completed the action, you will be taken back to the Maintain Plan Data: Execute Actions screen.
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Plan Version	01	Current plan
Object Type	0	Organizational unit
Object ID	31000125	NEW DEPARTMENT
Object abbr.	ND00	

Selection of Tasks		
Planning status	1	Active
Validity	05/01/2009	to 12/31/9999
Action	0	Create organizational unit



The Object ID will be created for the new Organizational Unit. Be sure to record this for future reference.

- 22. You have completed this transaction.
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Results You have created an Organizational Unit.
