

Manager's Desktop (PA-MA)



Release 4.6C



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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

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Manager's Desktop (PA-MA)

Manager's Desktop

Purpose

The range of tasks of many line managers is changing. Administrative tasks are being decentralized, and central service functions are carried out in individual departments. This is the case in Accounting and Logistics as well as in Personnel Management: managers themselves are taking over certain personnel tasks for their area of responsibility.

The SAP software tool *Manager's Desktop* is specially set up to support such tasks that have been transferred to individual departments.

In the Personnel Administration task area, *Manager's Desktop* provides all the information managers need to independently carry out decentralized tasks: transparency and up-to-date information at the touch of a button. Integrated reports support decision-making and make it easier to control and check personnel processes in the department.

For example, line managers can call up area-specific organizational structures online, with directly and indirectly subordinate employees, and at the same time get information about the salary structures in their entire area of responsibility. *Manager's Desktop* takes line managers directly to the personnel data of individual employees, or displays budget overviews that allow them to compare planned and actual personnel costs. *Manager's Desktop* is just as effective when displaying the current leave situation, and therefore provides a reliable basis for making decisions about employees' leave requests.

Even more transparency is available due to the integration of *Manager's Desktop* with the InfoSet Query in HR. There, managers can evaluate all employee-related data and see customer-specific reports. When line managers need comprehensive information, *Manager's Desktop* can also connect them with *Financial Accounting* and *Controlling*. In this way, they can call up budget data or request cost center reports.

Implementation Considerations

You make settings for functional and formal modifications or enhancements in *Manager's Desktop* in the relevant Implementation Guide (IMG) sections. You can access these via *Personnel Management* → *Manager's Desktop*. Customizing enables you to insert your own background picture or company logo as well as enter your own reports in the function tree of theme categories. See also [Scenario-Specific Settings \[Page 48\]](#)

Integration

Manager's Desktop, as an HR component, brings together cross-application functions, which allow the line manager immediate access to relevant HR data, as well as to data from *Financial Accounting* and *Controlling*.

Organizational Plan as a Prerequisite

An organizational plan of your company, including the organizational structure and the staff assignments, that is, the assignment of employees (persons) or users to positions, in the *Organizational Management* component, is a prerequisite for the comprehensive use of *Manager's Desktop*.

Manager's Desktop

The person (or user) who has logged on to the system must also be the holder of a chief position. The system uses the chief position indicator (relationship A/B 012 between the position and the organizational unit) to determine the organizational units managed directly and indirectly by the position holder (see below).

To display corresponding cost centers, you must assign a cost center to the chief position or organizational unit. See also [Organizational Plan \[Ext.\]](#).

Integration with Personnel Administration

Manager's Desktop must be integrated with *Personnel Administration*. If it is not, error messages will appear when transfers are made or jobs/positions are changed that affect one or more employees.

Integration with Accounting

If you want budget evaluation to be possible, and cost center information to be available, *Manager's Desktop* must be integrated with *Accounting*.

Workflow Support

Integrated workflow support plays an important role in those operations that are processed locally. It makes sure that employees in the personnel department are seamlessly integrated in these processes. For example, if an employee is to be transferred, the line manager starts the action by entering the basic data. A little later, the action appears in the workflow inbox of the responsible HR administrator, who takes over further processing and then reports back to the manager in the same way when the action has been successfully completed.

Integration with Employee Self-Service

Manager's Desktop not only connects line managers and personnel, but also involves employees in general processes. For example, if *SAP Employee Self-Service* is integrated, employees can transfer leave requests or travel expenses directly to *Manager's Desktop* for checking and decisions. Approved requests and expenses are then sent via workflows to the personnel department as well as to the employee concerned. Of course, the line manager can also process and maintain his own person-related data, enter travel expenses or process benefits data within *Manager's Desktop* without changing tools.

Features

The range of processes that line managers can initiate from their desk using *Manager's Desktop* is extremely varied. They can plan and modify positions, carry out reorganizations and initiate transfers, plan personnel resources, or adjust wages and salaries. For personnel tasks, line managers usually use *Manager's Desktop* to initiate a process, which is then executed centrally by the personnel department.

The range of functions in *Manager's Desktop* is constantly increasing. From release 4.6a, line managers also have direct access to appraisals of employees within their area of responsibility. In addition, they can view qualifications and the skills involved, and for each qualification they can display the employees who have these skills.

Presenting an Area in a Tree Structure

When a manager (or user) registers in *Manager's Desktop*, the system determines which organizational units he/she is responsible for. The organizational units selected in this way, and the corresponding positions and holders, are displayed in a tree structure, and can be maintained using the function tree in the left screen area. The manager's area of responsibility that is

Manager's Desktop

displayed represents only a part of the enterprise's organizational plan, unless the manager is in charge of the whole enterprise.

You can hide the uppermost node of the organizational area of responsibility, in other words the name of the user who holds a chief position, in all theme categories with such a structure. Make this setting in customizing.

The user (manager) can use tab pages to choose between different views of his or her organizational area of responsibility: he or she can therefore choose, for example, whether the system should display only the directly subordinate, or all subordinate organizational units with the corresponding positions and holders, and whether the respective master cost center should also be displayed.

For each theme category you can define in customizing which tab pages and therefore which views of a manager's area of responsibility are available to him or her. Based on these settings, the manager can decide individually which of the available tab pages he/she would like to display on his desktop. See also [Displaying and Hiding Tab Pages \[Page 46\]](#).

Adaptable Functions and Theme Catalog

The executable functions in Manager's Desktop (reports, transactions, access to URLs and the workflow inbox, and so on) are subdivided according to content into the following theme categories:

- Employees
- Organization
- Costs & Budget
- Recruitment
- Workflow Inbox
- Special Interests

These categories can be organized according to customer requirements and be enhanced using the function codes available in customizing.

The manager can deactivate categories and functions that he or she does not need from the initial screen as well as other screens in the application. He or she can switch between preset categories and functions and specific settings and functions at any time. See also [Selecting Theme Categories and Functions \[Page 44\]](#).

Additional individual requests or special information requirements can also be included: if you frequently need to access particular Intranet or Internet pages, you can call them up easily using corresponding links.

The function tree on the left side of the screen provides the manager with an overview of the executable functions in each theme category. A button in the menu makes switching between categories quicker. The drag & drop function may also be used. This simplifies the execution of functions for objects in the organizational area of responsibility.

Adaptable Initial Screen

Managers can customize the initial screen of *Manager's Desktop*, that is, they can insert a company logo or their own background.

In customizing or using a menu path, you can specify that the system should skip the initial screen and go straight to a particular theme category. The first time a manager enters *Manager's*

Manager's Desktop

Desktop, the system displays the first theme category that was defined in customizing (in the standard, *Employees*) and the first defined tab page (*Directly Subordinate Employees*).

After that, when *Manager's Desktop* is started, the system displays the last-displayed theme category, and within that, the last-displayed tab page. See also [Skip Initial Screen \[Page 45\]](#).

Drag & Drop

New techniques such as *Drag & Drop* simplify, for example, the execution of functions that relate to those objects belonging to a line manager's area and that are displayed in a tree structure. These objects are organizational units, positions and position holders (employees, persons or users). The line manager is able to carry out evaluations of all of these objects. The line manager can also use the drag & drop function to carry out reorganizational actions within his or her area. He or she can, for example, place organizational units and positions under other organizational units.

You can, however, specify in customizing that the line manager is not allowed to use drag & drop to make changes in his or her organizational area of responsibility. See also [Drag & Drop Function \[Page 15\]](#).

Functions in *Manager's Desktop*, as well as the standard theme categories, are documented in the following chapters.

Constraints

Manager's Desktop is a cross-application tool. Its strength lies in the functions it offers in Human Resources. It is not intended that all functions of a particular component be combined in *Manager's Desktop*. But it should include applications that are useful with regard to managers' requirements.

Initial Screen

Definition

The initial screen gives you an overview of the main application scenario of *Manager's Desktop* as preset by SAP. This is made up of the five theme categories displayed and their function lists. To call up a theme category screen with the corresponding function tree, select the theme category with the mouse.

Use

Category and Function Settings

The first time you log on to *Manager's Desktop*, all theme categories and all functions available in a category are presented. This main scenario is displayed as an extensive function list in a dialog box in the *Settings* menu option. The categories form the first level of the function tree; the functions included in the categories are subordinate to them.

Both the categories and the functions have check boxes next to them. If you deselect a function, it will not be displayed in future when you select the category. If you deselect all functions belonging to a category, the category will no longer be available on the initial screen. See also [Selecting Theme Categories and Functions \[Page 44\]](#)

Accessing Theme Categories

To access the screen for a particular theme category, click on the theme category on the initial screen. A function tree appears with all functions available (if you are using a customer-specific view these will be your user functions).

Structure

- If you want to see a list of categories and functions giving an overview of the SAP preset application scenario for *Manager's Desktop*, choose *Settings*.
- Under that menu option you can adjust the preset theme categories and their functions to suit your requirements. You can do this by deactivating categories or functions that you do not need in your application.
- You can skip the initial screen and go directly to one of the theme categories. See also [Skip Initial Screen \[Page 45\]](#)

Screen Layout

Screen Layout

Definition

This topic describes the theme category screen, which is divided into two screen areas.

Structure

The screen is divided into a right screen area, where your area of responsibility is displayed, and a left screen area, in which the available functions are displayed in a function tree.

The tab pages in the right screen area allow you to access different views of the organizational structure for your area of responsibility. They therefore influence the choice of displayed organizational objects that the functions in the left screen area may be executed for.

1. Right Screen Area with Tree Structure Showing Area of Responsibility

In the right screen area, the system displays the organizational structure that you are responsible for. The organizational structure displayed, with its corresponding organizational objects, is therefore a section of the organizational plan of the company.

The structure is initially compressed but can be expanded. Every node in the tree represents an object that can be displayed by clicking the appropriate icon.

The tree structure contains organizational objects that can be related with each other and that are in your area of responsibility. The organizational objects displayed, and in turn the positions and holders (persons or users) assigned to them, are your direct or indirect responsibility. The displayed object types also include, for example, cost centers, which can be assigned to organizational units or positions.

Tab Pages

Using the tab pages in the right screen area, you can access different views of your area of responsibility. The following views are offered as standard:

- *Directly Subordinate Employees* gives you access to those organizational objects (organizational units, positions and holders) that you are directly responsible for.
- *All Subordinate Employees* gives you access to all organizational objects, even those that you are not directly responsible for.
- *Directly Subordinate Employees* means that the system displays not only holders of chief positions who report to you, but also – if there is no chief position in an organizational unit – the directly subordinate employees. Note that a position hierarchy that exceeds the displayed organizational structure is not taken into account.
- *Cost Center* gives you access to all organizational objects (also the indirectly subordinate ones) together with their cost centers, as far as cost centers exist for the organizational units displayed.
- *Applicants* means that, in the context of recruitment, the system displays the names of applicants who are assigned to positions under your responsibility.
- *Project Assignments* means that the system displays the assignments of WBS elements (work breakdown structure elements) to organizational objects.



- You can specify the tab pages you want to display by choosing *Settings* → *Tab pages*.
- You can display/hide the object's attributes or relationships by choosing *Settings* → *Column configuration*.

2. Left Screen Area with Function Tree

In the left screen area, the system displays the standard or customer-specific preset function tree for the particular theme category. It contains all functions that can be executed for objects in the right screen area, as well as the non-executable subcategories, which simply subdivide the function tree.

By selecting *Settings* from the menu, you can switch between the preset and user-specific settings. You can also modify your user-specific settings.

Functions on the Right of the Screen

Use

The following are the functions relating to the presentation and processing of the user's organizational area of responsibility on the right of the screen. These functions relate to the theme categories *Employees*, *Organization*, *Costs and Budget*, and *Recruitment*.

Features

There are different types of functions on the right of the screen:

- Functions that display additional information on organizational objects
- Functions used to enhance the tree structure
- The Drag & Drop function and other functions used for editing.

Displaying Additional Information

Use

This function allows you to display additional information on the objects in the structure of the organizational area of responsibility, or information that is important when moving objects.

Features

Additional Information on Objects in the Tree Structure (Column Configuration)

Every organizational object that is displayed in the tree structure on the right of the screen has a *key (ID)*, an *abbreviation* and a *validity period*. Every relationship or assignment has an *assignment period*, an *assignment text* and an *assignment percentage record*. It is also possible to add the name of the head of an organizational unit.

If you want to display the additional information on the displayed objects in corresponding columns on the right side of the screen, select the relevant check box and choose *Settings* → *Column configuration*.



You can only hide or display additional information for those theme categories that are displayed in the manager's area of responsibility of the on the right side of the screen.

Additional Information when Moving Objects

If you choose Move with Additional Information under the menu option Settings, information is displayed when an organizational object (organizational unit, position, holder) is moved. The new assignment that can be carried out (green traffic light) is displayed in a dialog box with icons and additional information.

If you are unable to move an object, a dialog box will appear containing a yellow and/or red traffic light icon and additional information, even if the function mentioned above has not been selected.

Obtaining Additional Information by Double Clicking

By double clicking on a selected object in the tree structure, you access a dialog box displaying the corresponding object type, *organizational unit*, *position* or *holder (user or person)* as well as the ID, abbreviation and the validity period of the object.

If the organizational unit has a chief position assigned to it, the dialog box also contains a table control. This contains a display of the chief position with its assigned holder and relationship periods.

By selecting *Detail* from this dialog box, you access a screen containing further information and those attributes (characteristics), marked by a green check mark, that have been maintained for the object concerned.

Icon Legend

By selecting *Legend* from the icon bar, you access a dialog box that displays those icons that are used in the tree structure for the different object types.

Expanding/Compressing the Structure

Use

You can expand individual nodes by one level by clicking on the plus sign. Expand the individual objects completely by highlighting them using the left mouse button and choosing *Expand* from the icon bar. The compressing function works in the same way.

If you want to expand or compress the entire structure completely, select *Expand All* or *Compress All*. This function works no matter where the cursor is positioned.

Drag & Drop Function

Use

You can use the drag & drop function in *Manager's Desktop* to:

- apply the functions from the function tree to objects in the area of responsibility on the right side of the screen
- edit objects or structures within the area of responsibility



Note that you cannot use the drag & drop function if you are using a web GUI user interface layer. In that case you can use the alternative functions described below under **Other Editing Functions**.

Features

There are three ways of using the drag & drop function:

- **Drag & drop from right to left**

Select one or more of the objects from the organizational structure that is displayed on the right of your screen using the left mouse button. If you want to select more than one object, press the *Control* button at the same time.

If you click on an object and hold down the left mouse button, you can carry out one of the functions from the function tree by dragging the object to the function.

- **Drag & drop from left to right**

Select one or more of the objects from the organizational structure using the left mouse button.

Select one of the function icons from the function tree and, while holding down the left mouse button, drag it to one of the selected objects in the organizational structure.

In the same way, you can drag the function to an object that has **not** been selected. The function concerned will then be executed using this object as a key, regardless of any future selections.

- **Drag & Drop for Moving Organizational Objects**

Within the *Employees, Organization and Costs and Budget* theme categories, you can use drag & drop to move organizational units, positions or holders (employees/persons or users) in the organizational structure to a position under another object in the structure. Select one or more objects with the left mouse button and then, holding the left mouse button down, drag the object(s) to the new position.



The circle with the line through it indicates that the organizational object you want to move can not be moved under the object you have selected.

Drag & Drop Function**Other Editing Functions**

In addition to this, *Manager's Desktop* offers you the following possibilities for executing functions in the function tree:

- Select one or more of the objects in the organizational structure using the left mouse button and select a function from the function list by clicking the left mouse button.
- Select one or more of the objects from the organizational structure using the left mouse button. When you click the right mouse button on the selected object(s), a list of those functions from the function tree that you can use for the selected object appears in a context menu. By clicking on the left mouse button, you can select one of the functions.

Employees

Definition

The *Employees* theme category includes reports that relate to general employee information (HIS) as well as training, appraisals and personnel development.

Use

Using the functions of the *Employees* theme category, you can call up the data you require on directly and indirectly subordinate employees in your area of responsibility in the form of a report (evaluation), as well as start reports on staff development. In addition, you can create and evaluate appraisals and qualification profiles for employees, and requirements profiles for positions. You can then use this data to run profile matchups. Finally, you can start Travel Management reports.

Structure

Using the function tree on the left screen area, you can execute the following functions and reports:

1. InfoSet Query

The InfoSet Query enables the manager to access information from all areas of Human Resources. [HR in Infoset Query \[Ext.\]](#)

2. Reports on general employee information from HR Master Data [Employee Information \(HIS\) \[Page 19\]](#)

3. Reports on employees' time data (HIS)

- Absences [Attendance/Absence Data: Overview \(RPTABS20\) \[Ext.\]](#)
- Absence quotas [Displaying Absence Quotas \[Ext.\]](#)
- Attendance [Attendance/Absence Data: Overview \(RPTABS20\) \[Ext.\]](#)
- Attendance check [Attendance Check \(RPTAB00\) \[Ext.\]](#)
- Personal work schedule [Personal Work Schedule \(RPTPSH10\) \[Ext.\]](#)
- Time leveling [Time Leveling \(RPTCMP00\) \[Ext.\]](#)
- Time statement [Time Statement \(RPTEDT00\) \[Ext.\]](#)

4. Reports on education and training [Reports on Education and Training \[Page 20\]](#)

5. Performance appraisals [Performance Appraisals/Personnel Development \[Page 21\]](#)

6. Reports on Personnel Development [Performance Appraisals/Personnel Development \[Page 21\]](#)



The tab page you select and the position of your cursor in the right screen area are crucial when determining the extent of a report. For example, if you choose the tab page *Directly Subordinate Employees* and select an organizational unit of your choice, the report only covers that organizational unit with its corresponding employees.

Employees

If you choose the *All Subordinate Employees* tab page, the organizational unit you selected **and all** organizational units and employees underneath it will be considered.

7. **Reports on travel management** [Reports on Travel Management \[Page 22\]](#)

Employee Information (HIS)

Use

You can execute the reports displayed in the function tree on the left of the screen, which provide you with employee information (HIS) on the employees (persons) in your area of responsibility. All reports come from HR Master Data and are assigned to the *Employees* theme category.

Prerequisites

See **Integration** under [Manager's Desktop \[Page 5\]](#).

Features

You can execute the following employee information (HIS) reports:

- Education and training [Education and Training \[Ext.\]](#)
- Anniversary of years of service [Anniversaries of Years of Service \[Ext.\]](#)
- Entries/Leavings [Entries/Leavings \[Ext.\]](#)
- Vehicle [Vehicle Search List \[Ext.\]](#)
- Family members [Family Members \[Ext.\]](#)
- Birthday [Birthday List \[Ext.\]](#)
- Seniority/gender [Gender Sorted by Seniority \[Ext.\]](#)
- Age/gender [Gender Sorted by Age \[Ext.\]](#)
- Maternity
- Nationality
- Severely challenged persons
- Master data sheet [Master Data Sheet \[Ext.\]](#)
- Telephone [Telephone List \[Ext.\]](#)
- Power of Attorney [Powers of Attorney \[Ext.\]](#)



Online documentation can also be called up from within the report via *Extras* → *Documentation*.

Reports on Education and Training

Reports on Education and Training

Use

From the function tree on the left of the screen you can execute reports that provide you with information on education and training for the employees (persons) or organizational units in your area of responsibility. All reports come from [Training and Event Management \[Ext.\]](#) and are assigned to the *Employees* theme category.

Prerequisites

See **Integration** under [Manager's Desktop \[Page 5\]](#).

Features

You can execute the following reports on education and training. Reports can be executed for both employees (persons) and organizational units.

- Bookings with History [Training History per Attendee \[Ext.\]](#).
- Attendee bookings [Bookings per Attendee \[Ext.\]](#).
- Attendee prebookings [Prebookings per Attendee \[Ext.\]](#).
- Instructor function (employees/persons only) [Resource Reservation Statistics \[Ext.\]](#).
- Attendee cancellations [Cancellations per Attendee \[Ext.\]](#).
- Budget comparison (organizational units only) [Budget Comparison \[Ext.\]](#).

Performance Appraisals/Personnel Development

Use

In the function tree on the left side of the screen you can execute employee appraisals and reports on the qualifications and profiles of the employees (persons) in your area of responsibility. These functions and reports come from the [Personnel Development \[Ext.\]](#) component and are assigned to the *Employees* theme category.

Prerequisites

See **Integration** under [Manager's Desktop \[Page 5\]](#)

Features

You can execute the following functions and reports:

1. **Performance appraisals** [Functions of the Appraisal System \[Ext.\]](#)
 - Evaluate appraisals [Evaluating Appraisals \[Ext.\]](#)
 - Create appraisals [Creating an Appraisal \[Ext.\]](#)
2. **Personnel Development**
 - Qualifications overview [Qualification Overview for an Organizational Unit \[Ext.\]](#)
 - Employee profile [Profile \[Ext.\]](#)
 - Requirements profile [Profile \[Ext.\]](#)

This report can only be used for the object type *Position* and concerns requirements of current positions.
 - Profile matchup [Profile Matchup \[Ext.\]](#)

Using this report, you can compare profiles of employees' qualifications and the requirements of a position.

Travel Management Reports

Use

In the function tree on the left of the screen you can execute reports that provide you with information on travel management for the employees (persons) in your organizational area of responsibility. All reports come from [Travel Management \[Ext.\]](#) and are assigned to the *Organization* theme category.

Prerequisites

See **Integration** under [Manager's Desktop \[Page 5\]](#).

Features

You can execute the following reports or functions:

1. **Approving Trips**
2. **Travel Accounting**
 - a. Trip data/Totals
 - b. Trip receipts
 - c. List of trip receipts
 - d. Cost assignment
 - e. Trip destinations
 - f. Find documents using maximum rate
3. **Travel Planning**
 - a. Overview of planned trips
 - b. Flights
 - Flights according to airline
 - Flights according to company
 - Flights according to destination
 - Flight tickets
 - c. Hotels
 - Hotels according to chain
 - Hotel chains
 - Hotels according to location
 - d. Car rental
 - Car rental according to location
 - Car rental according to chain

Organization

Definition

The *Organization* theme category contains functions that relate to planning and administration within the area of responsibility, as well as to reorganizational changes to the tree structure.

Use

Using the functions from the *Organization* theme category, you can make changes to, evaluate and plan organizational objects within your area of responsibility as well as make reorganizational changes. Using the drag & drop function, you can, for example, move organizational objects within the tree structure as well as move employees (persons) out of your area of responsibility.

In addition, you can display the assignments of WBS elements (work breakdown structure elements) to organizational objects.

Structure

Using the function tree on the left of the screen, you can execute the following functions and reports:

1. Planning and Administration

- a. Change positions [Changing a Position \[Page 24\]](#) ; [Changing Positions \[Page 25\]](#)
- b. Evaluate unoccupied positions [Evaluating Unoccupied Positions \[Page 26\]](#)
- c. Transfer across area of responsibility [Transferring Across Areas of Responsibility \[Page 27\]](#)
- d. Reorganization [Reorganization \[Page 28\]](#)
 - Remove objects [Reassign Objects \[Page 29\]](#)
 - Assign objects [Reassign Objects \[Page 29\]](#)

2. Project Assignments

- a. Display project assignments

Using this function you can display assignments between WBS elements (work breakdown structure elements) and organizational objects in your area of responsibility. See also [Work Breakdown Structure \(WBS\) \[Ext.\]](#)

Changing a Position

Changing a Position

Use

There can be various reasons for changing a position.

It is possible, for example, that an employee must carry out certain tasks that are not assigned to his or her job and do not appear in his or her position description, Or perhaps the name of a position no longer fits an employee's activity.

In that case you will have to change the attributes of the object, for example the job assignment, position description or the position name.

When changing job assignments, you must enter an action if persons are related to positions, that is if they are the holder of the position. In doing this, you trigger the change, which means that a workflow is activated. An administrator from the personnel department must check and close the action. [Workflow – Transferring Employees \[Page 32\]](#)

Changing Positions

Use

[Changing a Position \[Page 24\]](#)

Procedure

1. You are in the tree structure of your area of responsibility. Select a position using the left mouse button.
2. Select the *Change Position* function using the left mouse button.

The *Change Position Data* dialog box appears, in which the data to be changed is read and displayed on the displayed key date. You can change the names of positions or overwrite the jobs that describe them.
3. If the position you selected is occupied, in the case of a changed or new job assignment, you must select an action.
4. Choose Save.



Alternatively you can use the *drag & drop* function to drag a position to the *Change Position* function in the function list.

Result

The modified attributes are saved in the database on the key date displayed. Once the database has been updated, a message appears; otherwise, an error message appears. The attributes of the position remain unchanged.

If you change the start of the processing period to the appropriate key date and then execute the *Change Position* function again using the same position, the system reads the data previously stored on the database.

Triggering Workflow

Once the data has been successfully stored in the database a workflow is always triggered when person data must be updated due to changes. In that case the personnel administrator responsible receives a work item in his or her inbox. He or she then decides whether to:

- carry out the action
- reject the action, or
- make changes, set a new end date for the validity period of the assignment, for example.

Evaluation of Unoccupied Positions

Evaluation of Unoccupied Positions

Use

If you use this function in the *Organization* theme category, you can extend periods in which positions that are assigned to a specific organizational structure or organizational units are unoccupied.

Periods for which positions are unoccupied will be listed as days per position and then added together. The average period per position will also be given.



Note that the scope of this evaluation, that is, the number of organizational units included, depends on which tab page you choose on the right side of the screen. The tab pages determine whether the system includes all subordinate organizational units or only the selected organizational unit (in the case of the *Directly Subordinate Employees* tab page).

Transferring Across Areas of Responsibility

Use

You want to transfer an employee (person) to a position that is outside your area of responsibility and is therefore assigned to another manager.

Prerequisites

- You can transfer persons (employees), but not positions or organizational units out of your area of responsibility.
- The employee to be moved must occupy a position within your organizational area of responsibility.

Procedure

1. Select the employee (person) you want to move in the tree structure on the right of the screen and drag the object to *Transfer outside* in the function tree on the left of the screen.

The *Transfer across areas of responsibility* dialog box appears.



You can not transfer users (object type abbreviation *US*).

2. Enter the date from which the transfer is to apply.
3. Enter, for example, *02* for the personnel action *Organizational change*.
4. Select the manager or key (ID) of the target organizational unit.
5. Save your entries.

Result

The manager of the target organizational unit receives a workflow task; he or she must specify a position to which the employee (person) is to be assigned within his or her area of responsibility.

A red arrow icon appears next to the employee indicating that he/she is to be moved to another area of responsibility. The assignment period is displayed for the original position.

The arrow icon is displayed until the personnel action (*Organizational change*) is executed in Personnel Administration and the transfer is complete.



The arrow icon will only appear when you select the *Directly Subordinate Employees* and *All Subordinate Employees* tab pages.

Reorganization

Reorganization

Use

You use this function to initiate a reorganization within your area of responsibility, or to transfer employees (persons) to positions either within or outside your area of responsibility. For transferring employees (persons) to positions outside your area of responsibility, see [Transfer Across Area of Responsibility \[Page 27\]](#).

Features

You can make the following reorganizational changes:

You can move organizational units, positions or holders (employees/persons or users) within the tree structure of your area of responsibility to another organizational object using drag & drop.

Activities

1. As a change of assignment between organizational units and positions or between positions and holders directly or indirectly affecting an employee (person) occurs during a reorganization, a dialog box containing a date field and a combo box for the selection of an action appear.
2. From the combo box, choose a personnel action that describes the reorganization process.
3. When you save the dialog box, a workflow is automatically triggered. This means that you yourself do not have to carry out personnel actions that are necessary due to the transfer. This is carried out by a member of the human resources department who receives the workflow tasks in his or her inbox, checks, processes and closes the personnel actions. See also [Workflow – Transferring Employees \[Page 32\]](#)



If employees (persons) are moved, a red arrow appears next to the original location until the personnel action is carried out in Personnel Administration. A green arrow appears next to the location that the object is being moved to. The original and future assignment periods are also both displayed. The arrow and the assignment periods only appear, however, if you select the *Directly Subordinate Employees* or the *All Subordinate Employees* tab page.



Note that there are certain object types that you can **never** assign to other object types. You cannot, therefore, put position holders (employees/persons or users) directly under organizational units, positions under persons, or organizational units under organizational units that are assigned to them. In this case, an error message will appear and - if required - a dialog box with detailed information. [Meaning of the Traffic Light Icons \[Page 31\]](#)

Moving Objects

Use

[Reorganizing/Moving Employees \[Page 28\]](#)

Procedure

Moving Objects Using Drag & Drop

If you want to move organizational units, positions or holders (employees/persons or users) within your area of responsibility, do the following:

1. Select one or more source objects (object you wish to move) and drag to the target object using drag & drop.
If at least one of the selected objects can be related with the new superior object, the *Move to...* dialog box appears.
2. Enter a start date. If the action concerns an employee (person) (also as the subordinate object), you must select a personnel action from the combo box.
3. Confirm your entries.

The new allocation and superior object appear in the tree structure.



If you previously selected *Settings* → *Move with Additional Information*, the new allocation is displayed in a dialog box with a green traffic light. This shows that the object may be moved.



If you choose an assignment that is not allowed, or a start date which is not valid for the source object you have selected, a dialog box will appear telling you that not all objects can be moved. You can display details or cancel the operation.

If you choose to display details, another dialog box will appear showing the source objects and different colored traffic lights. [Meaning of the Traffic Light Icons \[Page 31\]](#)

All objects with yellow or red traffic lights have a pushbutton with an info-icon beside them. If you click on the icon, a message appears telling you why the object cannot be moved. The objects with green traffic lights have check boxes, so that you can exempt them from the moving procedure if required.

Moving Objects Using Functions in the Function Tree

If you want to move organizational units, positions or holders (employees/persons or users) within your area of responsibility, do the following:

1. Select one or more source objects (objects to be moved).
2. Choose *Remove objects*

A message appears: *Object was removed.*

Moving Objects

3. Select the object to which you want to assign the source object.
4. Choose *Assign objects*.
If at least one of the selected objects can be related with the new superior object, the *Move to...* dialog box appears.
5. Enter a start date for the new assignment. If the action concerns an employee (person) (also as the subordinate object), you must select a personnel action from the combo box.
6. Confirm your entries.
A message appears: *Object(s) were moved*. The new allocation and superior object appear in the tree structure.

Meaning of the Traffic Light Icons

Use

This function allows you to move organizational objects (organizational units, positions or holders) and reassign them to new superior objects. You can not, however, carry out every imaginable combination of moves or assignments.

If an object can be moved, it will appear under the new target object in the tree structure. If you previously selected *Settings* → *Move with Additional Information*, a dialog box containing a green traffic light will appear.

If, however, one or more of the selected objects may not be moved, a message appears and, if previously selected, a dialog box displaying a green, yellow or red traffic light.

Green Traffic Lights

All objects that can be moved to the selected target node (target object) on the given date are given green traffic lights. Assignment periods are adjusted as follows:

If the beginning of the previous assignment comes after the selected moving date, the new assignment is created with the same start date as the previous one. Otherwise, the start date will be the same as the moving date.

The end of the new assignment will be the same as the end of the old assignment if the validity period of the new object allows. If the validity period of the object ends before the end of the old assignment, you cannot assign the object. The object appears under the **red traffic light**. If the end of the old assignment comes before the end of the validity period of the new object, you can display a message by pressing the info icon.

Yellow Traffic Lights

Those objects that can not be assigned to the target object on a given date are given a yellow traffic light. There are several possible reasons for this:

- The object no longer exists on the moving date
- The assignment to the previous object no longer exists on the moving date
- There is already a direct or indirect relationship between a person who is already related to an action and the object. The object can only be moved once the action has been executed.

Red Traffic Lights

Those objects that cannot be assigned to the target node (target object) are given a red traffic light. There are several possible reasons for this:

- The object type of the selected object cannot be assigned to the object type of the new object. [Reorganizing/Moving Employees \[Page 28\]](#)
- The end of the assignment of the old object is later than the end of the validity period of the new assignment.

Workflow – Transferring Employees

Workflow – Transferring Employees

Use

You want to perform a reorganizational change within your area of responsibility, that is, you want to move an organizational object to a new superior object. This process will directly or indirectly affect one or more employees (persons).

For this reason, you are required to enter a personnel action. When you enter a personnel action, the following workflow is started:

Prerequisites

The following prerequisites must be fulfilled before you can trigger the transfer workflow:

- You have set up an appropriate workflow. For more detailed information, particularly about how to customize this workflow, see the *SAP Easy Access Menu → Tools → ABAP Workbench → Development → Workflow → Definition Tools → Tasks/Task Groups → Display*. Under *Task Type*, choose *Workflow Template*, and under *Task*, enter *01000014* (workflow template codes: transaction *PFWS*). Note that the standard workflow template does not necessarily match your enterprise-specific requirements.
- The PLOGI EVENB (*Enhanced Integration*) and PLOGI EVCRE (*Generate Event for Entry T77INT*) switches in table T77S0 are set to 'X'. See also *Organizational Management* in the Implementation Guide (IMG) under *Set Up Integration with Personnel Administration*.
- During the transfer of the person, you select a personnel action type in the *Move to* dialog box. The system, however, only offers a choice of those personnel action types that have been specified in the view *V530_all* as relevant for Organizational Management.

Activities

1. Enter a personnel action in the relevant field.
2. Save your entries.
3. The personnel department employee receives the *Decision* work item in his or her inbox (transaction *SWLD-Integrated Inbox*).
4. He or she can either execute the personnel action, change it (enter another action type) or withdraw it.
 - Once the personnel action has been executed, the administrator, as well as the employee (person) concerned, is informed by mail.
 - If the action is withdrawn, the manager sees the original arrangement of the objects in the organizational structure (prior to the move). The personnel department employee receives confirmation of the withdrawal of the action in his or her inbox.
 - If you withdraw the reorganizational action, that is, reverse the transfer, the workflow is automatically canceled.

Costs & Budget

Definition

The *Costs & Budget* theme category includes functions which enable you to execute cost center accounting functions (*CO-Controlling* component), plan and display required positions for your area of responsibility, as well as calculate performance bonuses and salary adjustments (*HR-Compensation Management* component) for your employees.

Structure

The function tree on the left of the screen is subdivided into the following groups of functions with related content:

1. **Cost center accounting functions** [Cost Center Accounting Functions \[Page 34\]](#)

2. **Functions for planning required positions**

[Quota Planning \[Page 36\]](#)

[Quota Overview \[Page 37\]](#)

3. **Functions for determining performance bonuses and salary adjustments**

- Determine performance bonuses
- Make extraordinary adjustments
- Make salary adjustments

Note that these functions may only be carried out for the object type *Person*.

For more information on the use of *Compensation Management* functions within Manager's Desktop, see:

[Adjust Compensation \[Ext.\]](#)

[Adjust Compensation using the Adjustment Menu \[Ext.\]](#)

[Adjust Compensation using Manager's Desktop \[Ext.\]](#)

[Configuring Manager's Desktop for Compensation Management \[Ext.\]](#)

Cost Center Accounting Functions

Cost Center Accounting Functions

Use

On the left side of the screen you can execute cost center accounting functions for cost centers in your area of responsibility.

Prerequisites

See **Integration** under [Manager's Desktop \[Page 5\]](#).



Cost center assignments for organizational units and chief positions are made in the *Organizational Management* component via *Expert mode* → *Simple maintenance* → *Change* → *Change account assignment view* → *Master cost center*.

Features

The cost center accounting functions in the function tree are arranged as follows:

4. Reports on Cost Center Accounting Functions

- Cost centers [Area: Cost Centers \[Ext.\]](#)
- Cost types [Area: Cost Types \[Ext.\]](#)
- Current period
- Breakdown by partner [Cost Centers: Breakdown by Partner \[Ext.\]](#)
- Cost center commitment [Cost Centers: Actual/Plan/Commitments \[Ext.\]](#)
- Quarterly comparison



Online documentation on reports can also be called up from the report itself via *Extras* → *Documentation*.

For information on the report documentation, see also [Finding Documents using the Retrieval System \[Ext.\]](#) and [Finding Documentation on Reports \[Ext.\]](#).

For general information on reports for Cost Center Accounting, see [Report Painter Report \[Ext.\]](#) and [Interactive Information System \[Ext.\]](#).

2. Cost Center Planning Functions

- Cost type planning [Primary Cost Planning \[Ext.\]](#)
[Activity-Dependent Primary Cost Planning \[Ext.\]](#)
[Activity-Independent Primary Cost Planning \[Ext.\]](#)
- Activity input planning [Secondary Cost Planning \[Ext.\]](#)
[Activity-Dependent Activity Input Planning \[Ext.\]](#)
[Activity-Independent Activity Input Planning \[Ext.\]](#)

Cost Center Accounting Functions

- Activity planning [Activity Type Planning \[Ext.\]](#)
- Statistical key figures planning [Planning Statistical Key Figures \[Ext.\]](#)



For information on the corresponding profiles and layouts of cost center accounting, see also [Planner Profiles \[Ext.\]](#), [Planning Layouts \[Ext.\]](#) and [Standard Planning Layouts \[Ext.\]](#).

You make the settings for your own planning layouts and planner profiles in the relevant IMG (implementation guide) steps, via *Cost Center Accounting* → *Planning* → *Manual Planning* → *Define User-Defined Planning Layout* (SIMG_ORKS_MP_MDT) or *Define User-Defined Planner Profile* (SIMG_CFMENUORKSKP34).

Quota Planning

Quota Planning

Use

Using this function, you can plan required positions per job centrally for the organizational units you are **directly responsible** for. You can plan either in full positions, or in full-time equivalents (FTE).

A planning type is chosen centrally for each planning round. In other words, it is determined whether the *first plan*, *second plan* or another plan created in Customizing will be followed. The line manager can, therefore, only plan those planning types that are marked as 'current' in the *Plan Required Positions* screen.

In the same way, the unit of time (months, weeks, quarters, years, for example) according to which positions are planned over the entire planning period (01.01.1999 - 31.12.1999, for example) is predefined centrally in Customizing.

For further information on planning required positions, see [Quota Planning \(1019\) \[Ext.\]](#).



- You can make quota planning settings in the corresponding customizing activities in the IMG (implementation guide), in the *Manager's Desktop* component (*Personal Management* → *Manager's Desktop* → *Quota Planning*), and in the *Organizational Management* component (*Personnel Management* → *Organizational Management* → *Infotype Settings* → *Quota Planning*).
- You can find quota planning reports in the SAP Easy Access Menu under *Personnel* → *Organizational Management* → *Tools* → *Quota Planning*.

Activities

In the *Planned* line, enter for each time period the total number of positions required in your area of responsibility. You must also take into account the existing positions that are displayed directly above in the *Current* line.



In a planning period of one year, a manager must plan the positions he or she requires for his or her area for each quarter. Ten positions are predefined in the *Current* line. The manager plans no new positions for the first two quarters, two for the third quarter, and three more for the last quarter. The manager therefore enters the numbers 10,10,12 and 15 in the *Planned* line for the four quarters.

Required Positions Overview

Use

Once the manager has entered his or her required positions for a particular planning type for a period, his or her superior has an overview of the planning of the individual line manager or all line managers who report to him.

The overview displays the arrangement of the organizational units concerned in a tree structure.

Features

The following tab pages are also available to a line manager's superior. They are arranged above the table in the *Display Required Positions* screen.

- *Required Positions per Organizational Unit*

All current and planned required positions are displayed on this tab page, arranged by organizational unit.
- *Along Organizational Structure*

On this tab page is a list of required positions arranged by organizational structure. Required positions are added starting with the lowest organizational unit in the hierarchy.
- *Per Job*

This tab page displays all jobs and their respective positions available in the entire organizational structure.
- *Positions per Job*

This tab page displays required positions per job within a particular organizational unit. You must therefore first select an organizational unit. (This view corresponds to the line manager's 'active' planning view).



For the first three tab pages the position of the cursor in the organizational structure on the left side of the screen is irrelevant. This is because the required positions for all the organizational units are displayed. However, for the last tab page, an organizational unit must be selected.

Recruitment

Recruitment

Definition

The *Recruitment* theme category includes functions with which the line manager can display his or her decisions related to selecting personnel for vacancies directly in the system. The line manager can also directly trigger administrative processing of his or her selections in the personnel department.

Use

In their range and their execution, the functions in *Manager's Desktop* are adapted to the special requirements of the line manager as decision-maker in the process of selecting candidates for vacancies.

You can display your decisions about the further processing of applicants in *Manager's Desktop* by changing the vacancy assignment status (abbreviated: assignment status) of applicants assigned to vacancies in your area of responsibility. In this way you can, for example, trigger the arrangement of interviews directly over the system. For making changes you can use the [Drag & Drop Function \[Page 15\]](#). The system forwards your changes to the personnel department via an automatic mail connection. The personnel administrators responsible can immediately carry out the administrative measures that are necessary following the change in assignment status. In the above-mentioned example, the personnel department can immediately start planning interview appointments.

So that you can make informed decisions, you always have access to applicant data and can use functions that show you whether an applicant is suitable for a particular vacancy.

Structure

In the function tree on the left side of the screen are the following display and comparison functions:

- *Short profile*
- *Application documents*
- *Applicant activities*
- *Master data*
- *Qualifications profile*
- *Profile matchup*



Note that you can only execute the profile comparison if your system is integrated with *Personnel Development* and if a requirements profile has been created for the (vacant) position. Also note that you can only see the application documents if your system is integrated with the *SAP ArchiveLink* component, and if the documents are electronically archived.

To change the assignment status, you can use the following functions, found in the left screen area under the subcategory *Change assignment status*:

- *Reject applicant*

- *Invite applicant*
- *Offer applicant a contract*
- *Hire applicant*
- *Put applicant on hold*
- *Applicant in process*

If you execute one of the above-mentioned functions for an applicant, the SAP system automatically changes the assignment status for that applicant.

Changing the Assignment Status

Changing the Assignment Status

Use

You use this function to pass on your decisions about filling vacant positions within your area of responsibility to the personnel department. As soon as you change the vacancy assignment status (abbreviation: assignment status) for an applicant, the system automatically informs the personnel department by e-mail.

Prerequisites

On the right side of the screen the system shows you the applicants with an assignment status as follows:

- Applicants with the assignment status *in process*.
- Applicants with the assignment status *to be invited*.
- Applicants with the assignment status *put on hold*.



The system does not display applicants with another assignment status (*contract offered, to be hired, rejected*), since for these applicants the selection process has already been completed.

Features

As line manager, you can use the [Drag & Drop Function \[Page 15\]](#) in *Manager's Desktop* to go to application data and to change the assignment status. The system displays the successful change directly in the *Vacancy assignment overview* screen. The system removes from the right screen area applicants whose status you change to one of the following statuses:

- *Reject applicant*
- *Offer applicant a contract*
- *Hire applicant*

Workflow Inbox

Definition

Workflow tasks (work items) are delivered to the user's workflow inbox in list form. The following attributes are displayed for each work item: *Description*, *Priority*, *Date of receipt* and *Task*.

Structure

Sorting Work Items

Work items can be arranged in ascending or descending order for a better overview. There is a list of functions for each work item. These functions can be carried out for one or more work items at a time.

There is an arrow on the column header, which indicates how the inbox has been sorted. An upward arrow indicates ascending order and a downward arrow descending order. If you click with the left mouse button on a column header without an arrow, the contents of the column will be arranged in descending order. If you click again on the left mouse button, they will be arranged in ascending order.

Executing Work Items

You can execute a work item by clicking on the green arrow next to its description. It is also possible to select more than one work item by selecting the control button whilst clicking the left mouse button then choosing *Execute* from the top of the list on the icon bar. All selected items are executed one after another.

The inbox is updated after one or more work items have been successfully executed.

Displaying Work Items

To display work items, select *Display workitem* on the icon bar. If you have selected more than one entry, you can display all items by selecting the *Continue* button.

The following functions are also available in the icon bar: *Resubmit*, *Display attachment*, *Create attachment*, *Forward* and *Set to completed*.

Refreshing Information

If you select *Refresh* from the icon bar the system will check the presented selection with the database. If there are any new work items, they are added to the list.

Overview of Work Items

The function list on the left of the screen provides you with an overview of the number of work items in your inbox. These are listed according to different work item tasks and their respective total numbers. When you select a particular task, all relevant items are displayed on the right of the screen.

Special Interests

Special Interests

Definition

Within the theme category *Special Interests*, the user can access relevant Intranet and Internet pages with the help of a web browser that is integrated into Manager's Desktop.

The necessary settings can be made in the Implementation Guide (IMG) under *Personnel Management* → *Manager's Desktop*.

User-Specific Settings

Use

Over the menu you can define specific system settings that are valid for your individual desktop.

Prerequisites

You can only make settings for your desktop if the necessary customizing settings have already been made. You can therefore, for example, only select functions and theme categories for your individual desktop if they have already been defined as function codes in customizing.

Features

You can make the following specific system settings using the menu:

- Select theme categories and functions for the function tree [Select Theme Categories and Functions \[Page 44\]](#)
- Skip initial screen [Skip Initial Screen \[Page 45\]](#)
- Hide and display tab pages for each theme category [Hide and Display Tab Pages \[Page 46\]](#)
- Display additional information when moving objects [Display Additional Information \[Page 47\]](#)
- Display additional information about objects in the tree structure (column configuration) [Display Additional Information \[Page 47\]](#)

Selecting Theme Categories and Functions

Selecting Theme Categories and Functions

Use

On all *Manager's Desktop* screens you can choose from the complete list of standard theme categories and corresponding functions those which you need for your individual desktop. This includes the executable functions in the function tree (transactions, reports, access to a URL and so on) as well as the functions that simply provide structure in the function tree.

Prerequisites

The theme categories and functions you can choose from a list are defined in customizing as function codes.

Activities

1. To find out which theme categories and functions are valid for your individual desktop, choose *Settings* → *Functions* → *Function selection*.

A dialog box appears, with a list of all theme categories and functions for the Manager's Desktop scenario, in the order that was defined in customizing.

2. Select the required theme categories and functions.



If you do not select any of the fields, it is the same as selecting all fields.

3. Save your entries.



Over the menu option *Settings* → *Functions* you can switch between the standard theme categories and functions and the ones you chose. You can also make a new selection.

Skip Initial Screen

Use

On the *Manager's Desktop* initial screen you can specify that when you access Manager's Desktop again the system should skip the initial screen and call up a theme screen directly.

In that case, the next time you access Manager's Desktop the system displays the last theme category you displayed and within it the last-displayed tab page.

Integration

In customizing you can specify that the system should skip the initial screen the very first time you call up *Manager's Desktop* and should go directly to a theme category. In that case the system displays the first theme category that was defined in customizing and the first-defined tab page.

Activities

At the bottom of the *Manager's Desktop* initial screen, select the *Skip initial screen* field.

Displaying and Hiding Tab Pages

Displaying and Hiding Tab Pages

Use

You can use tab pages to choose between different views of your organizational area of responsibility: in other words you can choose, for example, whether the system should display only the directly subordinate, or all subordinate organizational units with the corresponding positions and holders, or with the addition of the respective master cost center.

For each single theme category in *Manager's Desktop* you can decide which tab pages you would like the system to display on your desktop on the right side of the screen.

Prerequisites

1. You have defined in customizing which tab pages and therefore which views of the organizational area of responsibility are available in each *Manager's Desktop* theme category. Starting from these settings, you can hide or display tab pages in each theme category on a user-specific basis.
2. You are on a theme category screen, in which the organizational area of responsibility is displayed on the right side of the screen.

Activities

1. To specify which tab pages you want to display or hide for each theme category, choose *Settings* → *Tab pages*.
A dialog box appears, in which all tab pages defined for the theme category in question are selected.
2. To hide a particular tab page for this theme category, deselect the relevant checkbox.

Displaying Additional Information

Use

This function allows you to display additional information on the objects in the structure of the organizational area of responsibility, or information that is important when moving objects.

Features

Additional Information on Objects in the Tree Structure (Column Configuration)

Every organizational object that is displayed in the tree structure on the right of the screen has a *key (ID)*, an *abbreviation* and a *validity period*. Every relationship or assignment has an *assignment period*, an *assignment text* and an *assignment percentage record*. It is also possible to add the name of the head of an organizational unit.

If you want to display the additional information on the displayed objects in corresponding columns on the right side of the screen, select the relevant check box and choose *Settings* → *Column configuration*.



You can only hide or display additional information for those theme categories that are displayed in the manager's area of responsibility of the on the right side of the screen.

Additional Information when Moving Objects

If you choose Move with Additional Information under the menu option Settings, information is displayed when an organizational object (organizational unit, position, holder) is moved. The new assignment that can be carried out (green traffic light) is displayed in a dialog box with icons and additional information.

If you are unable to move an object, a dialog box will appear containing a yellow and/or red traffic light icon and additional information, even if the function mentioned above has not been selected.

Obtaining Additional Information by Double Clicking

By double clicking on a selected object in the tree structure, you access a dialog box displaying the corresponding object type, *organizational unit*, *position* or *holder (user or person)* as well as the ID, abbreviation and the validity period of the object.

If the organizational unit has a chief position assigned to it, the dialog box also contains a table control. This contains a display of the chief position with its assigned holder and relationship periods.

By selecting *Detail* from this dialog box, you access a screen containing further information and those attributes (characteristics), marked by a green check mark, that have been maintained for the object concerned.

Icon Legend

By selecting *Legend* from the icon bar, you access a dialog box that displays those icons that are used in the tree structure for the different object types.

Scenario-Specific Settings

Scenario-Specific Settings

Use

You (the person setting up *Manager's Desktop*) make all the settings described here as predefined settings for the desktop application scenario in *Manager's Desktop* customizing. Based on your predefined settings, the user makes the required settings for his or her individual desktop.

Features

The settings you make in customizing can be subdivided as follows:

Settings for the Entire Scenario

- **Defining Customer-Specific Application Scenarios**

In the *Define Scenario-Specific Settings* step you define customer-specific application scenarios for *Manager's Desktop*. An application scenario consists of all the theme categories, subcategories and executable functions that are available to the user in an application.

- **Specifying Tab Pages**

In the *Determine Views of Organizational Structure* step, you define different views of a user's area of responsibility by specifying evaluation paths. The user can then display the views by selecting tab pages on the right side of the screen.

- **Skipping the Initial Screen**

In the *Define Scenario-Specific Settings* step, you use the *Skip Initial Screen* indicator to specify that the system should skip the initial screen, and go straight to a particular theme category.

- **Adapting the Initial Screen**

In the *Adapt Initial Screen* step you can make customer-specific adjustments to the initial screen of *Manager's Desktop* by inserting your own company logo and/or background.

Settings for the Left Screen Area (Function Tree)

- **Defining Customer-Specific Function Codes**

Using the customizing transaction *Wizard for Defining Function Codes*, you define new function codes that the user sees as either theme categories, subcategories or executable functions (reports, transactions and so on) in the function tree in the left screen area.

- **Extracting Data for a Graphics Application**

In the *Data Extraction* step, you specify how data from Organizational Management is to be extracted when the extraction is triggered in *Manager's Desktop*. You can then use the data in another application. With an appropriate graphics application, for example, you can use such data to create an organizational graphic with additional data.

You can call up the graphics application in the function tree under the *Organization* theme category.

- **Setting Up Quota Planning**

In the activities in the *Quota Planning* step, you make settings relating to required positions planning.

Settings for the Right Screen Area (Area of Responsibility)

- **Defining Tab Pages for Each Theme Category**

For each theme category in an application scenario, you can specify which tab pages (which views of the area of responsibility) are available to the user. This is done in the *Determine Views per Category* step.

- **Turning Off Drag & Drop Reorganization**

In the *Define Scenario-Specific Settings* step, you can specify with the *Reorg. not permitted* indicator that the line manager is not allowed to make reorganizational changes using drag & drop within his or her area of responsibility. This also means that the *Reorganization* subcategory in the function tree for the *Organization* theme category is no longer visible.

- **Hiding Name of User**

With the *Hide virtual root* indicator, you can specify that the virtual root of the area of responsibility in the right screen area (that is, the user who holds a chief position) is hidden in all theme categories with a corresponding structure.

- **Defining Columns for Additional Information**

In the *Column Framework* section, you define and configure columns and column groups that are used to display additional information in the right screen area.

Activities

You make the settings in the relevant customizing activities in the implementation guide (IMG) for *Manager's Desktop*, which you reach through *Personnel Management* → *Manager's Desktop* → *Customer Adjustment or Enhancement of Function codes* or *Quota Planning*.