HR506

Advanced Organizational Management

mySAP Human Resources

Date ______

Training Center ______

Instructors ______

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Education Website ______

Participant Handbook

Course Version: 2005 Q2
Course Duration: 2 Day(s)
Material Number: 50072149

An SAP course - use it to learn, reference it for work

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About This Handbook

This handbook is intended to complement the instructor-led presentation of this course, and serve as a source of reference. It is not suitable for self-study.

Typographic Conventions

American English is the standard used in this handbook. The following typographic conventions are also used.

Type Style	Description
Example text	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths, and options. Also used for cross-references to other documentation both internal (in this documentation) and external (in other locations, such as SAPNet).
Example text	Emphasized words or phrases in body text, titles of graphics, and tables
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example SELECT and INCLUDE.
`Example text`	Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, and passages of the source text of a program.
`Example text`	Exact user entry. These are words and characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

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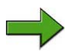
Icons in Body Text

The following icons are used in this handbook.

Icon	Meaning
	For more information, tips, or background
	Note or further explanation of previous point
	Exception or caution
	Procedures
	Indicates that the item is displayed in the instructor's presentation.

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Contents

Course Overview

Course HR506 Advanced Organizational Management provides experienced Organizational Management Consultants with the possibility of expanding their knowledge in Data Model Customizing, Organization interface, Staffing and Manager's Desktop. The course also gives light to the relationship between Workflow and Organizational Management. In addition, depending on time and interest, the subject of Transports in Organizational Management can also be dealt with with the participants.

Target Audience

This course is intended for the following audiences:

- Human Resources Project Team Members
- Human Resources Consultants

Course Prerequisites

Required Knowledge

- **SAP HR** mySAP HR Solution Overview
- **HR100** Essentials of Human Resources
- **HR120** Essentials of Personnel Development
- **HR505** Organizational Management

Recommended Knowledge

- **HR305** Configuration Master Data

Course Goals

This course will prepare you to:

- Enhance the Organizational Management data model
- Customize the Organization and Staffing and Manager's Desktop interfaces
- Understand Workflow in Organizational Management.

Course Objectives

After completing this course, you will be able to:

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- Add customer object types and relationships to the Organizational Management data model,
- Customize Manager's Desktop and the Organization and Staffing interface and add new object types and relationships to them,
- Set up and understand Workflow in Organizational Management

SAP Software Component Information

The information in this course pertains to the following SAP Software Components and releases:

Unit 1

Enhancing the Data Model

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Unit Overview

The unit *Expansion of the Data Model* is concerned with the creation of own object types and their relationships for the business processes of Human Capital Management in the SAP System. Participants will also create evaluation paths using knowledge from the course HR505.

Unit Objectives

After completing this unit, you will be able to:

- Customize your own object types and their relationships
- Create the basic infotypes for these object types
- Maintain the new object types in expert mode and on the **General Structures** interface.

Unit Contents

Lesson: Enhancing the Data Model

Lesson Overview

- Adding Customer Object Types to the Data Model
- Creating the Most Important Infotypes for the New Object Type
- Adding Customer Relationships to the Data Model
- Maintaining the New Object Types and Relationships in Organizational Management

Lesson Objectives

After completing this lesson, you will be able to:

- Customize your own object types and their relationships
- Create the basic infotypes for these object types
- Maintain the new object types in expert mode and on the **General Structures** interface.

Business Example

Your enterprise has implemented SAP Human Resources with all components, and has noticed that the standard object types and relationships in Organizational Management are not sufficient to depict your personnel development concept with *training groups*. You have, therefore, decided to depict the concept in Organizational Management by creating a new object type and your own relationship.

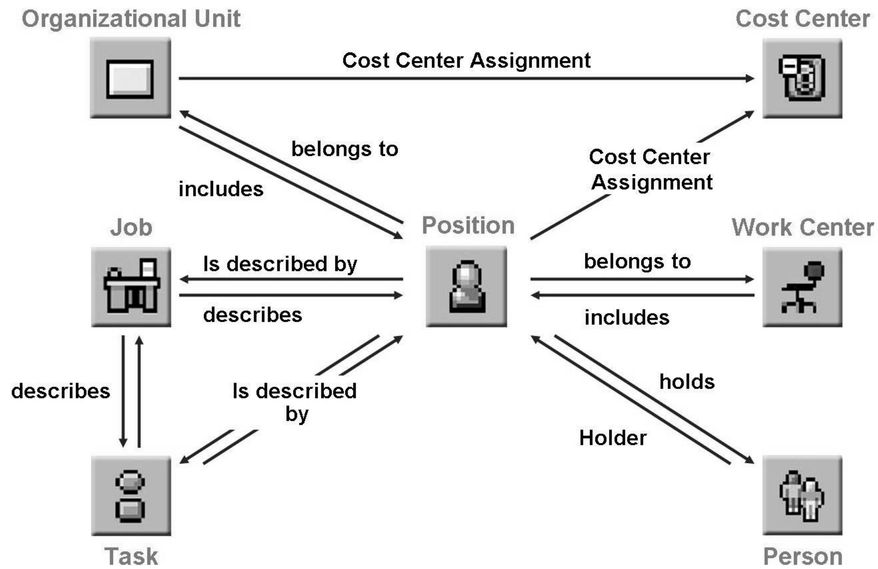

Figure 1: Organizational Management Data Model

The basic Personnel Planning object types, their infotypes and relationships were introduced in the *Organizational Management* course. All object types in the Personnel Planning data model are defined in table T778O. Each organizational object is restricted by the *allowed relationships* of its object type.

You can use **object-oriented design** like building blocks to depict your organizational plan in the system with the common object types and their relationships. Sometimes, however, the standard is not sufficient to meet the business requirements of an enterprise. In that case you can enhance the existing data model.

Creating New Object Types I

1. **Define the object type by assigning an ID inthe namespace 0*-9* and a name in table T7780**
2. Add infotypes IT1000 and IT1001 to the newobject type in table T777I
3. If required, add further standard or customerinfotypes

In the same way as these organizational object types were delivered to you with all their characteristics, you can create your own object types, give them characteristics in the form of infotypes, and link them to each other and/or to existing object types with your own relationships.

Object types are defined in table T778O by a two-character CHAR string.

The namespace A* - Z* is reserved for SAP; 0* - 9* is for customers.

Concerning the origin of the master record, we make a technical differentiation between

- **Internal object types**, whose master records are in database tables belonging to Personnel Planning (for example organizational units, positions, jobs, and so on), and
- **External object types**, whose master records are in database tables belonging to other SAP applications (for example people, cost centers, and so on). In Personnel Planning, the system only refers to these external objects using relationships. To define an external object type you must create an interface program (example / model: RHPREL00) and an entry in table T77EO.

You can see the tables for enhancing the data model in the ***Implementation Guide (IMG)*** under *Personnel Management→Organizational Management → Basic Settings → Enhanced Data Modelling → Maintain Object Types*

Creating New Object Types II

1. Define the object type by assigning an ID inthe namespace 0*-9* and a name in table T7780
2. **Add infotypes IT1000 and IT1001 to the newobject type in table T777I**
3. **If required, add further standard or customerinfotypes**

All information on objects is saved in the system in the form of infotypes, in particular the object itself (in other words its master record), and its relationships. The *Object* infotype (1000) and the *Relationships* infotype (1001) are the central Personnel Planning infotypes. Infotype 1000 defines the existence of an object in the system. All object types must have at least infotypes 1000 and 1001 in order to exist. The infotypes are defined in table T778T. In table T777I you can maintain the infotypes that are allowed for an organizational object.

Usually you create new objects using the *Object* infotype (1000), and then specify in the *Relationships* infotype (1001) which relationships exist between the objects. You must maintain the *Object* infotype (1000) before you can maintain all the other Personnel Planning infotypes.

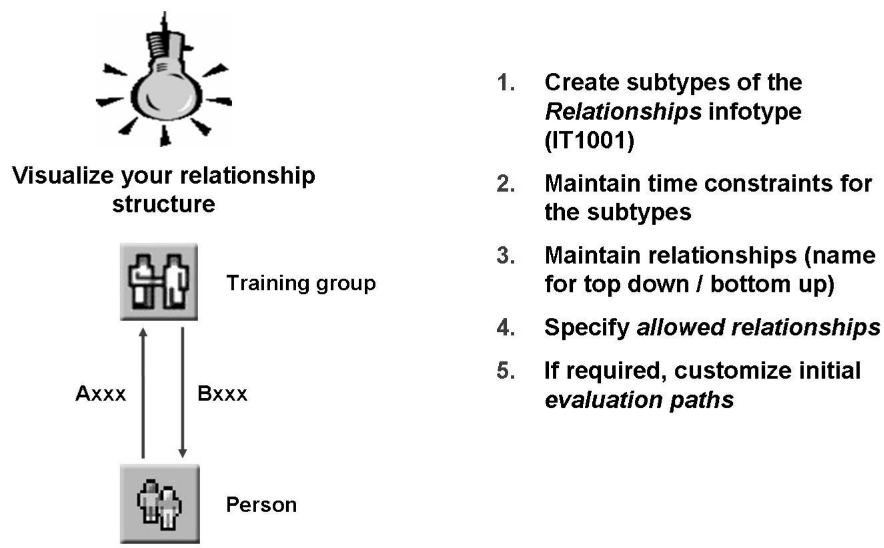

Figure 2: Creating New Relationships

Using **relationships** you can define links between the individual object types in the system.

Relationships are defined in table T778V by a three-character CHAR string.

In table TRESC the namespace is delimited as follows:

- SAP: ‚000‘ - ‚999‘
- Customer 'A**' - 'Z**'

Relationships are generally defined in two directions: *A = bottom up* and *B = top down*. However, this convention is simply a non-obligatory “suggestion” when you set up the relationship. What is important is that once you have assigned the directions A and B, you do not swap or change them later.

After this step, you define time constraints for the relationships.

Then you continue maintaining the relationships in table T777V (names for directions) and T777E (allowed relationships).

Using these relationships you can also create new evaluation paths.

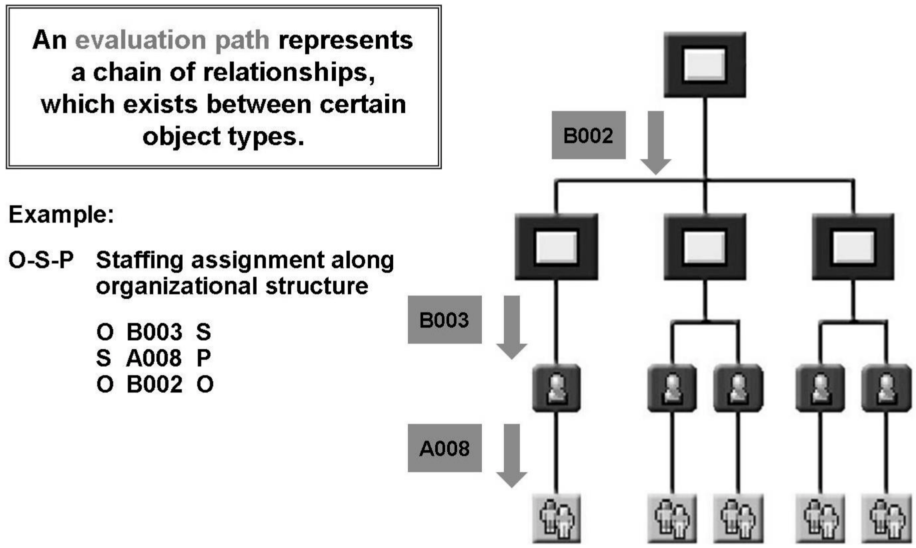

Figure 3: Evaluation Paths

Evaluation paths define the relationships with which a structure is created. Objects may have several relationships. Consequently, not all an object's relationships are displayed in one view.

Example: To display the staff assignment along the organizational structure (evaluation path O-S-P), you start with the organizational unit and determine the relationships to the positions. Starting from these positions, you then determine the holders of the positions. After this cycle is complete, you progress to a subordinate organizational unit where you start the cycle again. Cost centers and their relationships to organizational units are not displayed for this evaluation path.

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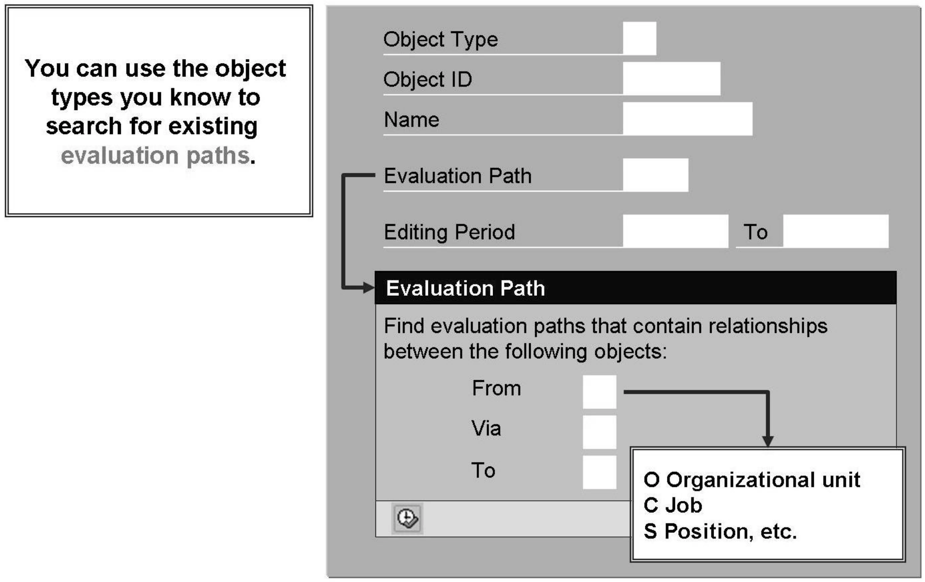

Figure 4: Finding Evaluation Paths

To help you choose the correct evaluation path, the *General Structures* interface allows you to use the F4 help to specify up to three object types that exist in the evaluation path as selection criteria.

Enter the objects you want to find in the evaluation path as the selection criteria.

When you access the *General Structures* interface, you can also generate *temporary evaluation paths*.

Evaluation Path	Info	Evaluation Path Text
...	i	...
...	i	...
O-S-P	i	Staffing assignment along organizational structure
...	i	...

No.	Object Ty..	A/B	Relationshp	Relationshp Name	Priority	Type of Relatd Ob
10	O	B	003	Includes	*	S
20	S	A	008	Holder	*	P
30	O	B	002	Is line manager of	*	O

Figure 5: Creating Evaluation Paths

You can create evaluation paths in Customizing for Organizational Management under *Basic Settings*.

One or more relationships form the navigation paths for an evaluation. They allow structure information (for example, organizational plan or reporting structure) to be evaluated.

In the *Skip field* in individual maintenance you can specify that a particular navigation path should be evaluated, but that the result should not be displayed.

You can create alphanumeric evaluation paths with a maximum of eight characters. The first letter should be *Z*.

Do not change any existing evaluation paths unless it is an evaluation path you have created yourself. These changes affect all programs and reports that perhaps use the evaluation path that you have changed in the background. Any changes you make could lead to system problems.

Should you prefer not to use a standard SAP evaluation path for reports that use an internal evaluation path, you can specify the alternative evaluation path in the Value Abbr. column.

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Important Customizing Tables for Personnel Planning

• T778O/T777O	Object Types
• T77EO	External Object Types
• T778V/T777V	Relationships
• T777E	Allowed Relationships
• T77AR	Additional Data on Relationships
• T777Z	Infotype Time Constraint
• T778T/T777T	Infotypes
• T777I	Infotypes per Object Type
• T778U/T777U	Subtypes
• T77ZR	Definition of Time Constraint Depending on Target Object Type

You can access the individual tables via the following path in the Implementation Guide:

- *Personnel Management → Organizational Management → Basic Settings → Data Model Enhancement*

Consistency Check in the Data Model

⇒ The report RHCHECK0 checks Customizing consistencyin the Personnel Planning data model

Infotypes / additional data

- Object type assignment
- Time constraint
- Structures
- Database tables

Relationships

- Allowed relationships
- Time constraint

Integration

- Active or inactive
- Active plan version

Exercise 1: Enhancing the Data Model

Exercise Objectives

After completing this exercise, you will be able to:

- Create new object types and relationships in Customizing

Business Example

You want to add new object types and relationships to the object-oriented model in Personnel Planning.

Task:

In your enterprise you have divided the employees into training groups, and you want to promote the development of these groups using different personnel development measures. You also want to maintain and manage the groups in Organizational Management.

1. To do this, create a new object type with the object type abbreviation "##" and the name **"Training Group ##"**. ## is your two-digit group number. To display the object type in the system you can use the ICON_PARTNER.
2. It should be possible to maintain relationships and descriptions for objects of this type.
3. Create a new relationship that tells you which person is assigned to which training group. Create a relationship with the abbreviation "Q##" and the names "belongs to training group (##)" and "includes person (##)".

   A person can only ever belong to one training group. Maintain the time constraints accordingly.
4. Based on the evaluation path SBESX, create your own evaluation path ZBES## that displays the organizational structure including positions, persons, and the persons' assignment to training groups. Also depict the reverse direction in your own evaluation path Z_##PSOO.
5. In the Organizational Management menu, choose **Expert Mode → General** and access the **General Structures** interface. Create objects for your new object type and link them to people using your new relationship. Select persons from the **Organizational Units HR Training Group *Training →International → Executive Board → ##Executive Board*.**

Solution 1: Enhancing the Data Model

Task:

In your enterprise you have divided the employees into training groups, and you want to promote the development of these groups using different personnel development measures. You also want to maintain and manage the groups in Organizational Management.

1. To do this, create a new object type with the object type abbreviation "##" and the name **"Training Group ##"**. ## is your two-digit group number. To display the object type in the system you can use the ICON_PARTNER.

   a) Call the SAP Implementation Guide (IMG) over the **menu path SAP Easy Access →*Tools → AcceleratedSAP → Customizing → Project Management → SAP Reference IMG*** .

   Select in *IMG → Personnel Management → Organizational Management → Basic Settings → Enhanced Data Modelling → Maintain Object Types.*

   Choose *New Entries* to create a new object type with the object type abbreviation "##" and the name **"Training Group ##"**. ## is your two-digit group number. Under Icon Name, enter the name **ICON_PARTNER**.

2. It should be possible to maintain relationships and descriptions for objects of this type.

   a) Choose the ***IMG activity→ Maintain Infotypes→Maintain Infotypes***. Add your new object type to the infotypes 1000, 1001, and 1002.

   To do this select the appropriate info type and double click on *Info Types per Object Type*.

   Then go to *New Entries* and make an entry for your Object type and your Infotype.

   Repeat this procedure for all object types.

3. Create a new relationship that tells you which person is assigned to which training group. Create a relationship with the abbreviation "Q##" and the names "belongs to training group (##)" and "includes person (##)".

   A person can only ever belong to one training group. Maintain the time constraints accordingly.

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a) Choose the ***IMG activity→ Relationship Maintenance → Maintain Relationships***. Create a relationship with the abbreviation **“Q##”** and the names **“belongs to training group (##)”** and **“includes person (##)”**.

Relationship	Bottom up relationship	Top down relationship
Q##	belongs to (##)	includes person (##)

In the **Allowed Relationships** step, enter the two directions of your new relationship to or from the object type Person.

OT	Object text	A/B	Rel	Relation-ship de-scription	Rel type O.	N. main-tainable
##		b	q##		p	
p		a	q##		##	

Choose the ***IMG activity→ Infotype Maintenance → Maintain Subtypes*** and enter the new subtypes AQ## and BQ## with their corresponding texts for infotype 1001.

Infotype	Infotype description	Subtype	Subtype text
1001		aq##	belongs to (##)
1001		bq##	includes person (##)

For your new object type ##, infotype 1001, and subtype BQ##, enter time constraint 3. For the object type P (person), infotype 1001, and subtype AQ##, enter time constraint 2.

Select the entry

Infotype 1001	Relationships	aq##	belongs to (##)

And double-click on Time Constraint. Select *New entries* in the Application menu bar. Maintain the following data in the table:

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Object Type	P	Person
Infotype	1001	Relationships
Subtype	AQ##	belongs to (00)
Time constraint	2	
Object condition		

Repeat the procedure and maintain your second new entry according to the following table:

Object Type	##
Infotype	1001
Subtype	bq##
Time Constraint	3
Object Condition	

4. Based on the evaluation path SBESX, create your own evaluation path ZBES## that displays the organizational structure including positions, persons, and the persons' assignment to training groups. Also depict the reverse direction in your own evaluation path Z_##PSOO.

   a) **Select in *IMG → Personnel Management → Organizational Management → Basic Settings → Enhanced Data Modelling → Evaluation paths*.**

      Choose **New Entries** and maintain an **evaluation path ZBES##** with the name **Training Group in Org. Structure (##)** with the following data:

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No.	Object Type	A/B	Relationship	Relationship description	Priority	Type Rel. Object
10	O	B	002	Determines System	*	O
20	O	B	003	Determines System	*	S
30	S	A	008	Determines System	*	P
40	P	A	Q##	Determines System	*	##

Maintain the inverse direction Z_##PSOO“Training Trip with Persons” as follows:

No.	Object Type	A/B	Relationship	Relationship description	Priority	Type Rel. Object
10	##	B	Q##	Determines System	*	P
20	P	B	008	Determines System	*	S
30	S	A	003	Determines System	*	O
40	O	A	002	Determines System	*	O

5. In the Organizational Management menu, choose **Expert Mode** → **General** and access the **General Structures** interface. Create objects for your new object type and link them to people using your new relationship. Select persons from the **Organizational Units HR Training Group** ***Training →International → Executive Board → ##Executive Board.***

   a) Call *Expert Mode → general (Transaction PP01)* using the path *SAP Easy Access → Human Resources → Organizational Management* and maintain *general structures →* (transaction PPSM) with your newly defined evaluation path. As the object type, enter ##. Create assignments from training groups to people and the other way around.

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Lesson Summary

You should now be able to:

- Customize your own object types and their relationships
- Create the basic infotypes for these object types
- Maintain the new object types in expert mode and on the **General Structures** interface.

Unit Summary

You should now be able to:

- Customize your own object types and their relationships
- Create the basic infotypes for these object types
- Maintain the new object types in expert mode and on the **General Structures** interface.

Unit 2

Customizing the Hierarchy Framework

Unit Overview

The unit Customizing the Hierarchy Framework provides a detailed overview of the Customizing options of the *Organization and Staffing* interface. The functions presented are synoyms for all interfaces based on the hierarchy framework besides this interface.

In the lesson Customizing the *Object Manager*, you will learn how to adapt this tool. This lesson will also detail how to adapt the column framework.

In the lesson Customizing the Structural Overview Object, we will turn to the *Work Area* and customize the overview area and the detail area

Unit Objectives

After completing this unit, you will be able to:

- Integrate further object types in the Organization and Staffing interface, and do the following for those object types
- Add search nodes to the search area
- Adjust the overview area accordingly
- Add new tab pages to the detail area.

Unit Contents

Lesson: Customizing the Object Manager

Lesson Overview

In this lesson you will customize the *object manager*. In doing so, you will also add your new object types and links there. At the same time you will learn how to adapt the column framework.

Lesson Objectives

After completing this lesson, you will be able to:

- Integrate further object types in the Organization and Staffing interface, and do the following for those object types
- Add search nodes to the search area

Business Example

Your company has decided that the new personnel development concept with training groups should be represented on the *Organization and Staffing* interface in the hierarchy framework. This will allow a clearer overview of the assignments of employees to training groups.

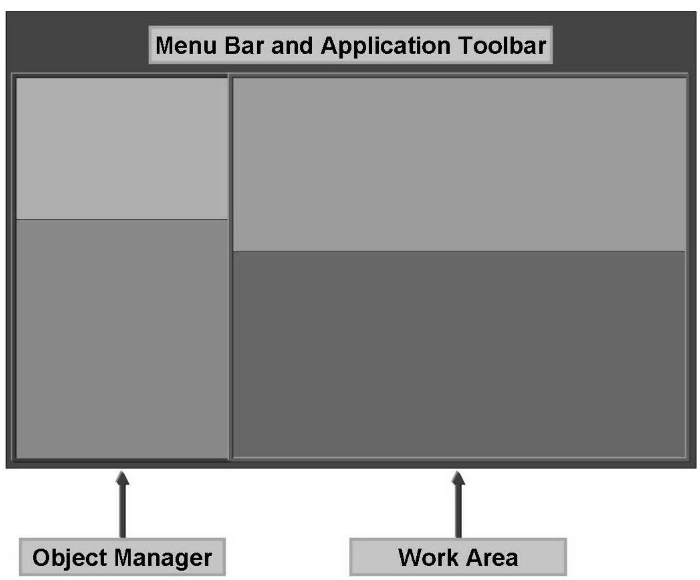

Figure 6: What Is the Hierarchy Framework?

The SAP hierarchy framework (HFW) is a basis development that helps you to program applications for visualizing and modifying hierarchical structures and objects. It provides a framework for displaying hierarchical structures like the ones you create in Organizational Management.

The interface layout of an application created using the hierarchy framework - like the *Organization and Staffing* interface - is divided into two screen areas. Above them are the menu bar and the application toolbar.

The area on the left is called the *object manager* and always consists of a *search area* and a *selection area*.

The area on the right of the screen is called the *work area*. It is built up in a specific way for each application, and can be further divided. In the case of the *Organization and Staffing* interface, it is divided into the *overview area* and the *detail area*.

If you want to display the basic technical names of the individual areas, you must maintain user parameters:

- OM_OBJM_SCEN_DISPLAY → *Object Manager Scenario*
- OM_FRAM_SCEN_DISPLAY → Framework Scenario
- OM_ARRAYTYPE_DISPLAY → Column Framework
- OM_TABTYPE_DISPLAY → Technical Tab Card Key

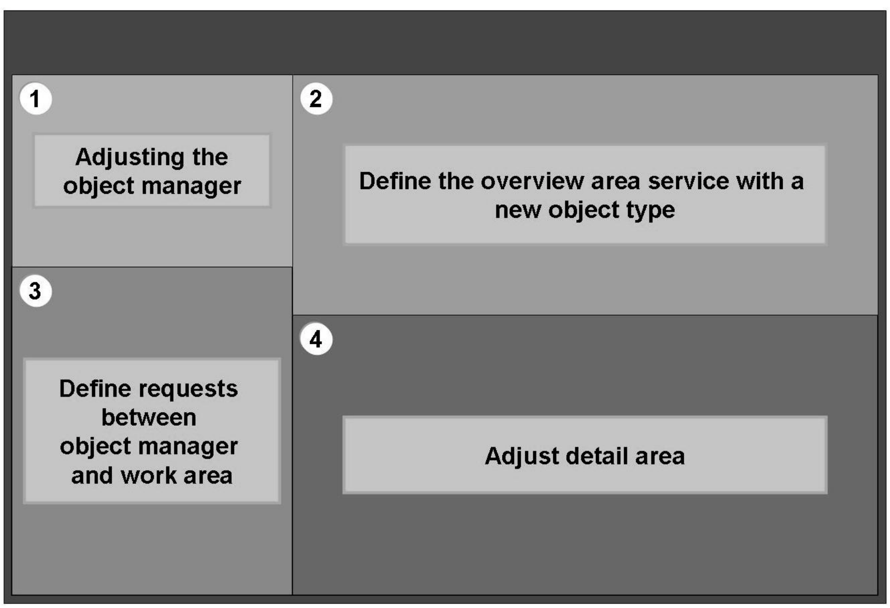

Figure 7: Customizing Steps

When maintaining the hierarchy framework on the Organization and Staffing interface, you begin by:

1. Adjusting the *object manager*,
2. Defining and adjusting the services in the overview area,
3. You then specify the interaction between the *object manager* and the services by defining requests, and
4. Finally you can control the way the tab pages are displayed in the detail area.

- **The IMG for the hierarchy framework**

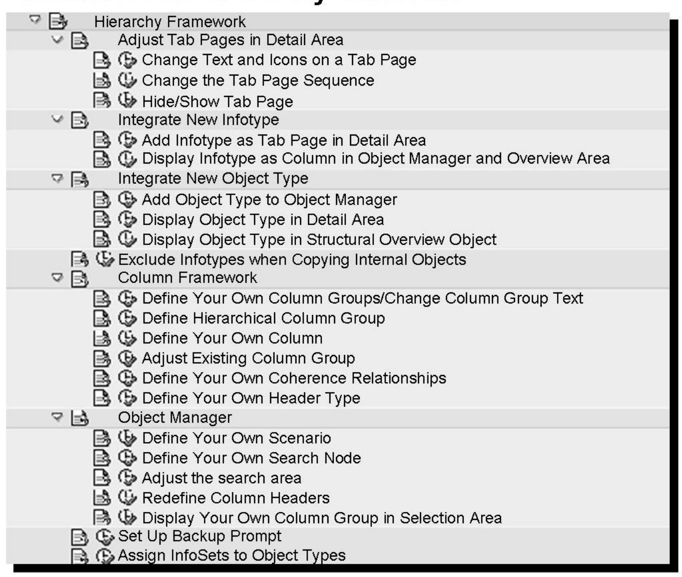

Figure 8: Customizing Steps in the Implementation Guide (IMG)

To make it easier to adjust the hierarchy framework in Organizational Management, we have added the most important table entries for maintenance to the Implementation Guide (IMG) as IMG nodes.

You must perform some of the IMG steps for your customer-specific adjustments.

Add Search Nodes to Object Manager

- Define your own search nodes for the object type
- Adjust the search area
  - Add further nodes to the search area or change the sequence of the search nodes
  - Exclude search nodes
  - Adjust search nodes, and while doing so, assign search tools to your own search node
  - Exclude search tools from a search node

The *object manager* offers a range of configuration options. For example, you can specify the object types that are available for searches, define search tools, or specify which additional information should be displayed with the hit list in the selection area. A specific object *manager configuration* is represented by an *object manager scenario*.

You can enhance the object manager by

- **Adding and adjusting a search node in table T77FSEAN.**

Search Node Key	Name	Object Ty..	Icon Name
AP	Applicant	AP	
B	Development plan		
BA	Appraisal	BU	
BG	Criteria group		
BK	Criterion		
BL	Development plan group		
BP	Business partner		
BS	Appraisal template	BU	
BV	Budget structure element		ICON_BUDGET_STRU
C		C	

Figure 9: Defining a Search Node

You use table T77FSEAN to control how a search node is displayed. The search node itself is a group of search tools in the search area of the *object manager*.

A search node can be based on an object type in table T778O (for example the basis object types you know from Organizational Management), or it can be independent of object types. For example, it is possible to create a search node *Search for Last-Used Objects* with appropriate search tools. A search node can refer to an object type, it has a name, and an icon. The name and the icon are displayed in the search area of the *object manager*. If the search node refers to an object type, and if you do not enter another name or icon in the table for defining search nodes (T77FSEAN), the *object manager* uses the name and the icon of the object type from table T778O when displaying the search node.

If the user parameter OM_OBJM_SCEN_DISPLAY is set, the search area displays the *object manager scenario* that is active in a transaction.

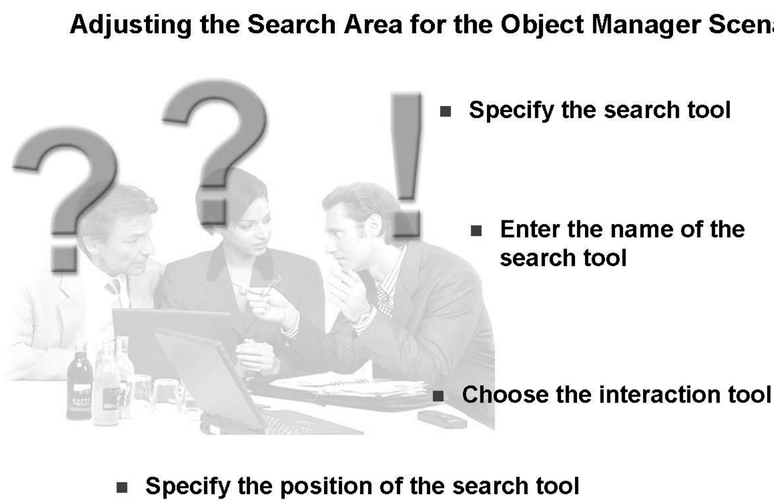

Figure 10: Adjusting the Selection Area

For the new *object manager scenario* you want to create, you defined your own search node in the previous step. Now you must specify how the *object manager* should display this search node. To do this, you first specify the corresponding search tools.

The search tools you select determine how the system searches for particular objects. Search tools you already know are the search for a *search term* (CL_HROM_SEARCHTOOL_ORGP), the *free search* (CL_HR_ST_ADHOC_SELECTION), and the *structure search* (CL_HR_OM_SEAT_STRUCTUAL_SEARCH). In the standard, they are used for various object types in the *object manager* on the *Organization and Staffing* interface.

You name your search tool and specify its horizontal position - in other words, its position in the sequence with the other search tools.

In this Customizing activity you specify the type of interaction tool. In other words, you specify which actions a user can perform for the search hits displayed in the selection area, and what the result of these actions is, or how the system reacts to the user actions. Actions can be: double-click, context menu, Drag&Drop, and so on.

Search tools and interaction tools are implemented as an ABAP object class.

- **You must define an evaluation path for the structure search in the object manager:**
  - **Either you use an existing evaluation path**
  - **Or you define a new evaluation path.**

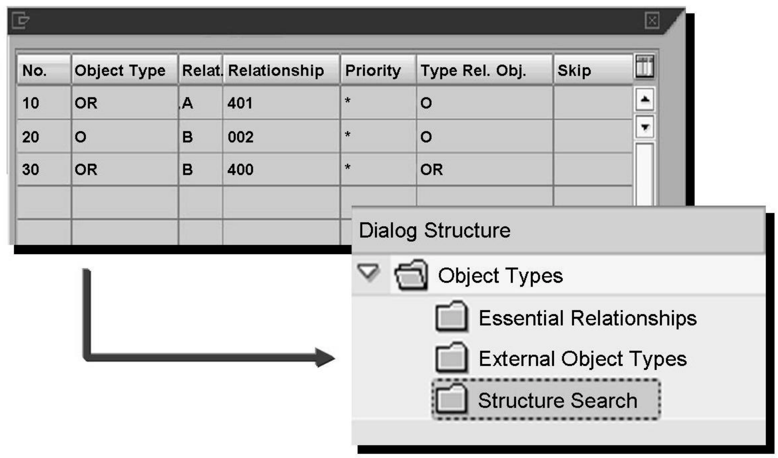

Figure 11: Structure Search in the *Object Manager*

For each **structure search** - in the *object manager* as well as in input help - you need an evaluation path. The system determines the evaluation path from table T77OS. You can store an existing evaluation path there, or create a new one in advance.

For the **free search**, you need an **InfoSet** that contains the data fields and object type you require. If you want to enhance the data model by adding your own object types and relationships, you must first generate this **InfoSet**. You define **InfoSets** in transaction SQ02. You can store this InfoSet for your free search using *IMG → Personnel Management → Organizational Management → Hierarchy Framework → Assign Object Types to InfoSets*.

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- **In the object manager**
  - **Dynamic column group**
  - **Column group selection**
  - **Selection of column header type**
- **In the column framework**

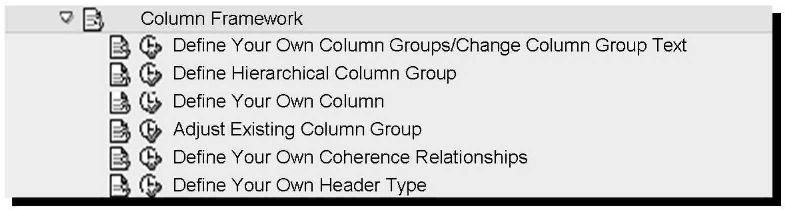

Figure 12: Adjusting the Column Framework

You can adjust the column framework to a certain extent while adjusting the *object manager*. Further options are under the IMG node *Column Framework*.

A column group defines the initial visibility and the initial display sequence of the columns assigned to it. In addition, you can create a coherence relationship between two or more of the columns in a column group, so that they are only displayed or hidden together.

If the user parameter OM_ARRAYTYPE_DISPLAY is set, you can find out which column group is currently being displayed in a structure or list display, and which columns are assigned to that column group, by choosing *Technical Info*. The system displays a dialog box for column configuration in the selection area of the *object manager*.

For search tools that generate a column group at runtime, you must set the *Dynamic Column Group* flag. An example of such a tool is the *free search*. There, the user can choose any columns in the hit list.

If you want to make more complex adjustments, you must make them using the Column Framework node. Here, you can completely redefine column groups, add several columns to a column group (by creating hierarchical column groups, you can also group column groups together), and in doing so also control the visibility options for those columns. Of course you can also do this for existing columns, by simply redefining them. To do this, you maintain entries in table T77ACOLC.

Exercise 2: Customizing the Object Manager

Exercise Objectives

After completing this exercise, you will be able to:

- Incorporate new object types in the object manager

Business Example

Your Personnel and Organization department wants to be able to maintain the newly created object type, “training group”, on the Organization and Staffing interface.

Task:

In your enterprise you have divided the employees into training groups, and you want to promote the development of these groups using different personnel development measures. You also want to maintain and manage the groups in Organizational Management. The normal working interface for your *Personnel and Organization* department is the *Organization and Staffing* interface. For that reason you would like to be to able to maintain the object type there too.

1. Add the object type ## to the *object manager*.
2. Use the key ***Training Group ##*** and the ***Icon_Partner***.
3. Work in the scenario ***OMEOO0*** with your group number ## to position your entry. You can use the column group NF_STO.

   For your search node, use the search tools ***search term*** and ***structure search***. Assign the names ***Training Group ## Search Term*** and ***Training Groups ## in Org. Structure***.
4. On the **Organization and Staffing** interface, check your *object manager* settings.
5. **Optional**

   For comparison purposes, use one of the other column groups with the abbreviation NF_ST* instead of NF_STO.
6. **Optional**

   Navigate through the other Customizing steps in the *object manager*.

Solution 2: Customizing the Object Manager

Task:

In your enterprise you have divided the employees into training groups, and you want to promote the development of these groups using different personnel development measures. You also want to maintain and manage the groups in Organizational Management. The normal working interface for your *Personnel and Organization* department is the *Organization and Staffing* interface. For that reason you would like to be to able to maintain the object type there too.

1. Add the object type ## to the *object manager*.

   a) Call up the SAP Implementation Guide (IMG) using the menu path ***Tools→Customizing→IMG→Project Management→ SAP Reference IMG***.

      In the ***IMG→, choose →Personnel Management →Organizational Management →Hierarchy Framework→Object Manager***

2. Use the key ***Training Group ##*** and the ***Icon_Partner***.

   a) Use the function ***Define Your Own Search Node→ Definition of Search Node→New Entries*** to create a search node for your object type ##.

      Make the following entries:

Field Name or Data Type	Values
Search Node Key	Z_##TrGrp
Name	##-Training Groups
Object Type	##
Icon Name	ICON_PARTNER

      Save you data and exist the Customizing view entirely.

3. Work in the scenario ***OMEOO0*** with your group number ## to position your entry. You can use the column group NF_STO.

   For your search node, use the search tools ***search term*** and ***structure search***. Assign the names ***Training Group ## Search Term*** and ***Training Groups ## in Org. Structure***.

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a) Choose Adjust Search Area ***Add Additional Node to Search Area*** → ***New Entries*** to specify the *object manager scenario* for which your new search node is valid.

Make the following entries:

Field Name or Data Type	Values
Object Manager Scenario	OMEO00
Search Node Key	Z_##TrGrp
Name	##-Training Group Search Term
Position	##
Column Group	NF_STO
Column Header Type	ORGSTRUC

Save your entries.

Edit your search node further under *Adjust Search Area* → *Adjust Search Node*→ *New Entries*.

Make the following entries:

Field Name or Data Type	Values
Object Manager Scenario	OMEO00
Search Node Key	Z_##TrGrp
Search Tool	CL_HR_OM_SEARCH-TOOL_ORGP
Name	Training Group ## Search Term
Interaction Tool	CL_HR_OM_IAT_ORGP.
Position	2
Standard Search Tool	X
Column Group	NF_STO
Header Type	ORGSTRUC

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Make similar entries for the search tool CL_HR_OM_SEAT_STRUC-TUAL_SEARCH. Give it position 1.

Enter the data in the following table here:

Field Name or Data Type	Value
Object Manager Scenario	OMEOO0
Search Node Key	Z_##FOKRS
Search Tool	CL_HR_OM_SEAT_STRUC-TURAL_SEARCH
Name	Structural search ## Training group
Interaction Tool	CL_HR_OM_IAT_ORGP
Position	1
Column Group	NF_STRUC_SEARCH
Dynamic column group	X
Header Type	ORGSTRUC

Hint: Before you can use the structure search as a search tool, you must store an evaluation path for the structure search with your object type.

Select *IMG→ Personnel Management → Organizational Management → Basic Settings→ Data Model Enhancement → Maintain Object Types*.

Select your object type ##.

Double click on the entry *Structrual Search* and open the view *Change structural search: Overview*

Eval. Path	Evaluation Path Text	Status Vector	Key Date	No Ovw.
ZBES##		1	✓	

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4. On the **Organization and Staffing** interface, check your *object manager* settings.

   a) On the Organization and Staffing interface, check your *object manager* settings by calling the transaction **PPOME** using *SAP Easy Access → →Human Resources→ Organizational Management → Organizational Plan→ Organization and Staffing →Change*.

5. **Optional**

   For comparison purposes, use one of the other column groups with the abbreviation NF_ST* instead of NF_STO.

   a) **The solution is the same as the exercise text.**

      For comparison purposes, use one of the other column groups with the abbreviation NF_ST* instead of NF_STO.

6. **Optional**

   Navigate through the other Customizing steps in the *object manager*.

   a) **The solution is the same as the exercise text.**

      Navigate through the other Customizing steps in the *object manager*.

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Lesson Summary

You should now be able to:

- Integrate further object types in the Organization and Staffing interface, and do the following for those object types
- Add search nodes to the search area

Lesson: Customizing the Structural Overview Objects

Lesson Overview

The lesson "Customizing the Structural Overview Objects" is concerned with the design of the structural area of the Organization and Staffing transaction. This constituent part of the framwork reflects the structures looked at using evaluation paths. It enables you to integrate new object types and relationships.

The lesson also looks options for adjusting the detail area using tab pages.

Lesson Objectives

After completing this lesson, you will be able to:

- Adjust the overview area accordingly
- Add new tab pages to the detail area.

Business Example

Your company has decided that the new personnel development concept with training groups should be represented on the Organization and Staffing interface in the hierarchy framework. This will allow a clearer overview of the assignments of employees to training groups.

Display Object Type in Structural Overview Object

- Defining the service of the overview area
- Specifying the properties of this service / this “"view"”
  - Specify the valid object type in each case
  - for the selection options
  - Specify the evaluation path with technical depth
  - Specify the column framework for the overview area.

In table T77OBJSER is defined which service an overview or detail object offers. For that reason, you must first define a service for the overview area in table T77OBJSER, and assign a service to it. To do that, enter a meaningful name / key for the service in the Service field of the interface object. In the Object Key field, enter the key of the structure overview object: GOWD (general overview with detail).

Then you must specify the attributes of the new service. In the *Object Type* field, enter the new object type for which the service is to be valid. In the *Selection field*, specify the selection type (single or multiple selection). In the structure overview object, you can use Drag&Drop to change the displayed structure. Here, the selection type determines whether you can select only one or several objects.

In the *Evaluation Path* field, enter your newly defined evaluation path. The system uses the evaluation path to define a structure tree, which then displays the structure overview object. To keep system response times to a minimum, the structure tree is not displayed in its fully expanded format. Instead, only the first "n" levels of the structure tree are visible. You define "n", in other words the level to which the structure tree is initially displayed, in the *Technical Depth* field.

In the *Column Group* field, enter a column group (see column framework). A column group delivered by SAP that you can use generically is NF_GEN_OV.

In the *Header* field, you can enter a header type that redefines the column headers of the column group. This is optional.

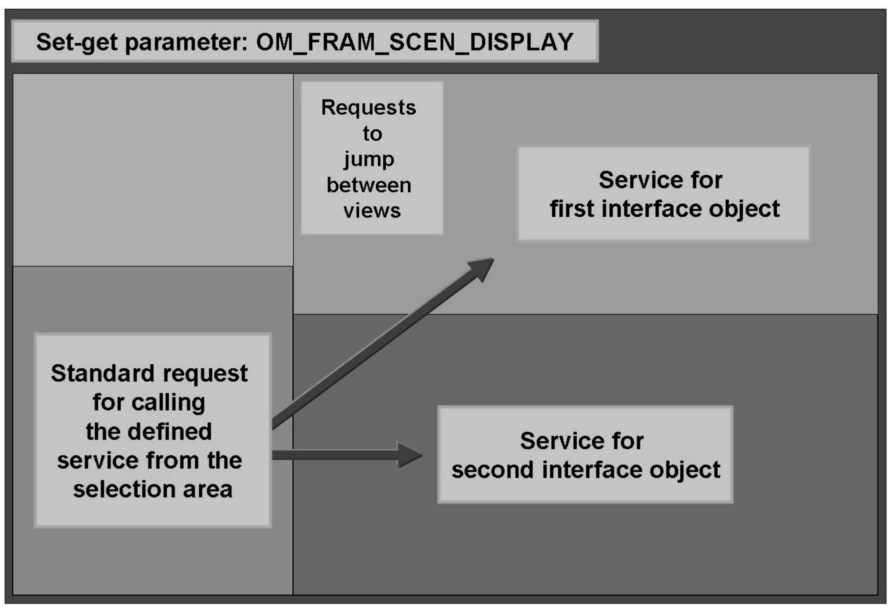

Figure 13: Requests

The services of an overview or detail object are not called directly. They are available indirectly to all interface objects via **Requests**. These requests therefore control which overview and detail objects are displayed in a hierarchy framework scenario at a particular time. First of all, you must therefore set up this control.

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To do this, you first define a new request. Start by entering the **Scenario** of the hierarchy framework into which you want to integrate the new object type. In the **Hierarchy Framework Request** field, you then enter a technical key (that is meaningful to you) for the new request, and a **descriptive name**. This name is displayed in the context menu, for example, and should describe the structure that is displayed by the structure overview object service that you will enter in the next field.

In the **Service** for First Interface Object field, enter the newly defined service for the structure overview object.

In the Service for **Second Interface Object** field, enter the service #DETAIL (GENERAL). This service is assigned to the detail object on the Organization and Staffing interface. The detail object displays all tab pages for the new object type.

In the Tab Page field, you can enter a **tab page** that you want the detail object to display when you call the request. This is optional. If you do not enter anything here (this is the usual case), the detail object determines which tab page is displayed first.

To identify the scenario used in the framework, you can use the set-get parameter **OM_FRAM_SCEN_DISPLAY** to display the scenario name in the title bar.

- **You can adjust the detail area of the hierarchy framework customer-specifically. That includes:**
  - **Adding customer info types to the detail area in the form of tab pages,**
  - **Hiding displayed infotypes, or showing infotypes that were previously excluded,**
  - **Changing the order in which the infotypes are displayed as tab pages.**

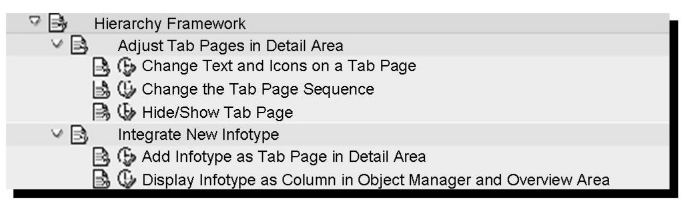

Figure 14: Adjusting Tab Pages

You can display simple customer infotypes on a tab page in the detail area. We recommend that you do this on an infotype-specific tab page (only one infotype).

For the display, the system uses the subscreen generated for the infotype in **transaction PPCI** (screen number 7000).

The procedure is as follows:

- Enter the infotype number in the entry field and choose **Create**. On the next screen, choose **Create Subscreen** from the **Infotype** menu.
- This generates **subscreen 7000**. Since this is an SAP program, a message appears, which in this case you can ignore.
- In table T77ID, under **Subscreen**, you enter subscreen 7000 for the infotype.
- Then you can add the infotype as a **tab page** in the detail area **(IMG -> Personnel Management -> Organizational Management -> Hierarchy Framework -> Integrate New Infotype**). This happens in two steps: first of all **Define own tab page** (or table T77OMTABS; for example IT1000 -> IT1503) and secondly **Add Your Own Tab Pages to an Existing Tab Page Group** (table T77OMTABUS), in other words you assign the new tab page to an object type and a scenario.

In this way you can integrate simple infotypes in the detail object display. For infotypes with their own tab pages or their own subscreens, there is as yet no instrument for integrating them into the detail area.

Exercise 3: Customizing the Structural Overview Objects

Exercise Objectives

After completing this exercise, you will be able to:

- Incorporate new object types in the overview area

Business Example

Your Personnel and Organization department wants to be able to maintain the newly created object type, "training group", on the Organization and Staffing interface.

Task 1:

1. Add your new object type ## to the overview and detail areas too.
2. Define your **own service** *for the structural overview object with the key Z_Employees in Training Group (##)*. As the object key, use *GOWD (General Overview with Detail)*.
3. Then specify the attributes for your service.

   Use the object type ##, your new evaluation path **Z_##PSOO**, and the **column group NF_GEN_OV** (General Overview).
4. Define your own request for the **scenario OME0** scenario with the key *Z_Request for P* in TrainingGroup## and the name *Training Groups with People (##)*. Use your service as the **Service for the First** Interface Object, and the service **DETAIL (GENERAL)** as the **Service for the Second Interface Object.**
5. Specify the object type for which your request is valid.
6. Check your Customizing settings on the interface, by displaying your assignments of people to training groups and assigning new people. In this context, test Drag&Drop, and maintain a Description for your training groups.

   Create future relationships between employees and training groups.

Task 2:

1. Perform the steps again in the same order for another structural overview object.

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Here, use the evaluation path Z_OOSP##, so that starting from an organizational unit, you eventually display all assigned positions, people, and their training group.

Assign the object type O for the request defined here.

Naming convention suggestion:

Service name: Z_##-TrGrpStructure;

Name: Training Groups in Org. Structure (00)

Request Z_REQUEST FOR ## IN ORG;

Name: Request Training Groups in Org. Structure (00)

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Solution 3: Customizing the Structural Overview Objects

Task 1:

1. Add your new object type ## to the overview and detail areas too.
   a) Call up the SAP Implementation Guide (IMG) using the menu path *Tools→Accelerated SAP→Customizing → Project Management→ SAP Reference IMG. In the IMG, choose → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Object Type → Display Object Type in Structural Overview Object*.
2. Define your **own service** *for the structural overview object with the key Z_Employees in Training Group (##)*. As the object key, use *GOWD (General Overview with Detail)*.
   a) Choose *Define Your Own Service for a Structure Overview Object→ Definition Service → New Entries*. Define your own service with the following entries:

Field Name or Data Type	Values
Service for Interface Object	`Z_Person in Training Group (##)`
Object Key	`GOWD` (General Overview with Detail)

   Save your entries.
3. Then specify the attributes for your service.

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Use the object type ##, your new evaluation path **Z_##PSOO**, and the **column group NF_GEN_OV** (General Overview).

a) Choose *Attribute Services* → *New Entries* and specify the attributes of your service by making the following entries:

Field Name or Data Type	Values
Service for Interface Object	`Z_Person in Training Group (##)`
Object Type	`##`
Selection	`Multiple Selection`
Evaluation Path	`Z_##PSOO`
Technical Depth	`3`
Column Group	`NF_GEN_OV` (General Overview)
Header Type	`ORGSTRUC`

Save your entries.

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4. Define your own request for the **scenario OME0** scenario with the key *Z_Request for P* in TrainingGroup## and the name *Training Groups with People (##)*. Use your service as the **Service for the First** Interface Object, and the service **DETAIL (GENERAL)** as the **Service for the Second Interface Object.**

   a) Select the scenarion OME0, and choose *Request Definition → New Entries.*

      Make the following entries:

Field Name or Data Type	**Values**
Scenario	`OME0`
Request	`Z_Request for P in TrGrp##`
Name	`Training groups with people (##)`
Service for First Interface Object	`Z_Person in Training Group (##)`
Service for Second Interface Object	`Detail (General)`
Tab Page	<leave blank>

      Save your entries.

5. Specify the object type for which your request is valid.

   a) Choose*Assign Your Own Request to an Object Type→ New Entries*.

Field Name or Data Type	**Value**
Scenario	OME0
Request	Z_Request for P in TrGrp##
Object Type	##
Standard request	X

      Save your entries.

6. Check your Customizing settings on the interface, by displaying your assignments of people to training groups and assigning new people. In this context, test Drag&Drop, and maintain a Description for your training groups.

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Create future relationships between employees and training groups.

a) You already know these maintenance steps.

Task 2:

1. Perform the steps again in the same order for another structural overview object.

   Here, use the evaluation path Z_OOSP##, so that starting from an organizational unit, you eventually display all assigned positions, people, and their training group.

   Assign the object type O for the request defined here.

   Naming convention suggestion:

   Service name: Z_##-TrGrpStructure;

   Name: Training Groups in Org. Structure (00)

   Request Z_REQUEST FOR ## IN ORG;

   Name: Request Training Groups in Org. Structure (00)

   a) Perform the steps again in the same order for another structural overview object. Here, use the evaluation path Z_OOSP##, so that starting from an organizational unit, you eventually display all assigned positions, people, and their training group. Assign the object type O for the request defined here.

Lesson Summary

You should now be able to:

- Adjust the overview area accordingly
- Add new tab pages to the detail area.

Unit Summary

You should now be able to:

- Integrate further object types in the Organization and Staffing interface, and do the following for those object types
- Add search nodes to the search area
- Adjust the overview area accordingly
- Add new tab pages to the detail area.

Unit 3

Customizing Manager's Desktop

Unit Overview

Unit Objectives

After completing this unit, you will be able to:

- Adjusting the Manager's Desktop
- Include your own function codes
- Redefine SAP standard scenarios

Unit Contents

Lesson: Customizing Manager's Desktop

Lesson Overview

In the Customizing unit of Manager's desktop, you learn how to set up the Manager's Desktop starting from scratch. You will set up your own scenario and then add your own tab pages and functions. In doing so, you will refer to SAP scenarios and then make customer-specific settings based on these.

Lesson Objectives

After completing this lesson, you will be able to:

- Adjusting the Manager's Desktop
- Include your own function codes
- Redefine SAP standard scenarios

Business Example

You want to implement Manager's Desktop in your enterprise as a tool for your managers. However, the standard version delivered by SAP is too extensive in some areas. Other functions are not available. You would therefore like to remove some function codes from Manager's Desktop. At the same time you want to allow managers in your enterprise to sort your employees into the different training groups.

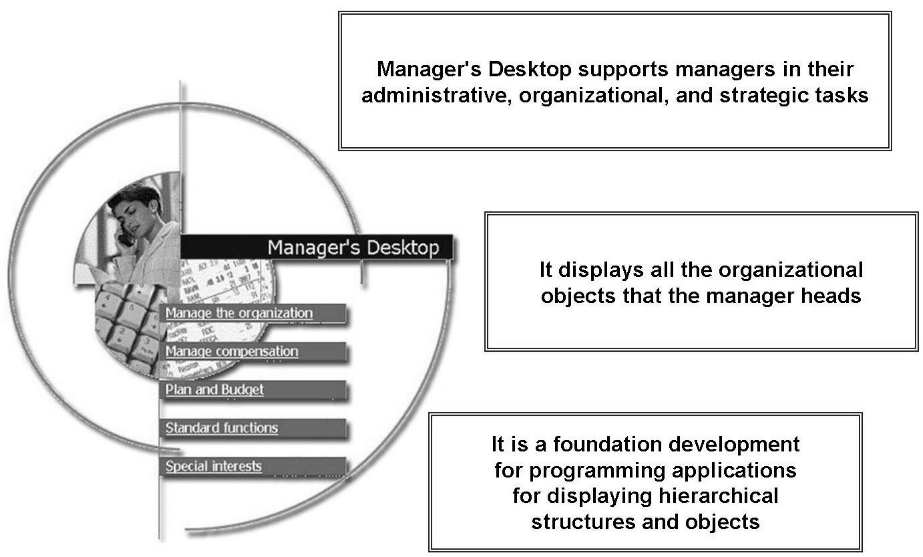

Figure 15: What is Manager's Desktop?

Manager's Desktop supports line managers in the administrative, organizational, and strategic tasks in their organizational area of responsibility.

In Manager's Desktop we differentiate between the organizational objects subordinate to the manager, which are displayed on the right of the screen, and the functions the manager can perform for those objects, which are are on the left of the screen.

Organizational objects are all objects that you can read in Organizational Management via evaluation paths, for example organizational units, jobs, positions, people, users, tasks, and work centers, but also cost centers, company codes, or requests. In this context, functions are reports, transactions, and function modules.

Seen from a technical point of view, the Manager's Desktop framework is a basis development that helps you to visualize and modify hierarchical structures and objects.

Executable functions with related content are grouped together. Each group is known as a theme category. The standard scenario delivered by SAP includes, among others, the theme categories **Employee, Organization** and **Costs and Budget,** which are displayed on the initial screen.

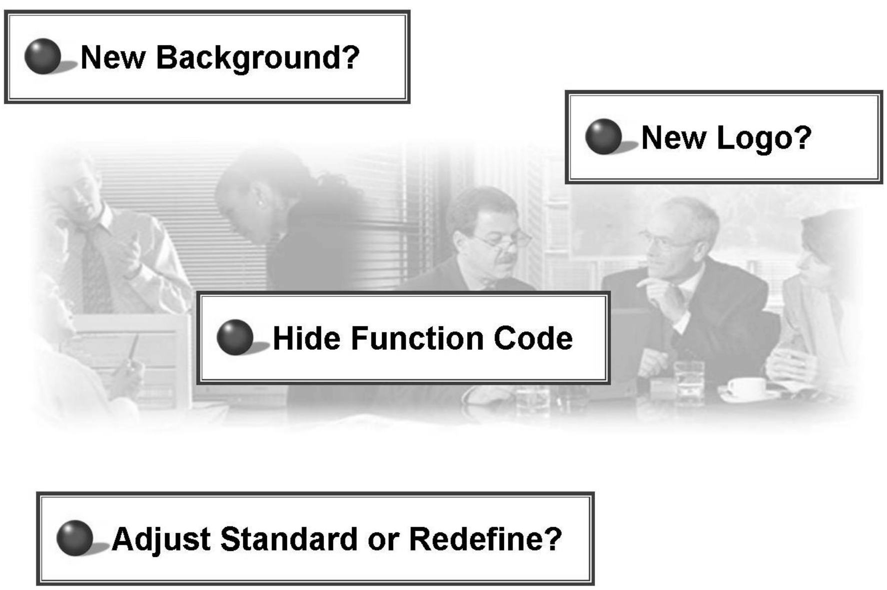

Figure 16: Customer-Specific Adjustments

Manager's Desktop standard settings include a wide range of functions. Not all customers use the full range. For this reason, there are numerous ways of making customer-specific adjustments in Manager's Desktop.

For example, it is very simple to store a customer-specific logo and background picture.

But it is also possible to make changes such as adjusting the function list by hiding SAP standard function codes and adding your own function codes, or storing customer-specific evaluation paths.

Here, you must consider carefully whether changing the standard is enough to incorporate all the particularities of your enterprise. Or is it perhaps even better to create your own scenario? Usually, adjusting the standard is enough to cover all the features specific to your enterprise.

Manager's Desktop Scenarios

Scenario	Name	Evaluation Path	No Reorganization Allowed	Referenced Scenario
MWB1	Manager´s Desktop	SAP_MANG	☐	
MWB2	Manager´s Desktop Copy	SAP_MANG	☐	
MWBS	Funds and Position Management Desktop	PMMWBS	☐	
WFBX	Workflow Inbox		☐	

You can:

- **Add new scenarios,**
- **Base new scenarios on existing scenarios, and**
- **Assign scenarios using the switch MDT SCEN in T77S0, and/or using user parameters.**

Caution: case sensitive

Figure 17: Working with Different Scenarios

In Customizing for Manager's Desktop, as well as adjusting a standard scenario, you can also define an entire scenario yourself. One way to do this is by copying an existing scenario under a new name and making changes to the new scenario. Take into account, however, the logic of the underlying tables: to make MDT run, you must also copy the corresponding evaluation paths, categories, and function code hierarchy to your scenario.

Depending on how you want to use the new scenario, it can be more effective to create a new scenario as described below. You can create a reference from a newly created scenario to an existing scenario. If you do that, the system automatically uses the reference scenario's settings for the evaluation paths (views) in table T77MWBD, the corresponding categories (table T77MWBK), and the function code hierarchy (table T77MBWFCH). In this way you can create several new scenarios on the basis of an existing one, with a sort of “inheritance” relationship between them. You can then enhance the new scenarios.

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Your scenario assignments work according to the following logic:

- In the code for the transaction PPMDT (RHMWB004), the system calls the scenario **MWB1** by default.
- In table T77S0, with the switch **MDT SCEN** and the entry for a scenario as a value, you can store another scenario as a default scenario.
- In addition, using the user parameter **MWB_SCEN**, you can assign alternative scenarios to different users. You can also create groups of managers for whom you can provide the same range of functions.

Hint: NOTE: When you assign scenarios via user parameters, bear in mind that the value (scenario abbreviation) is case sensitive.

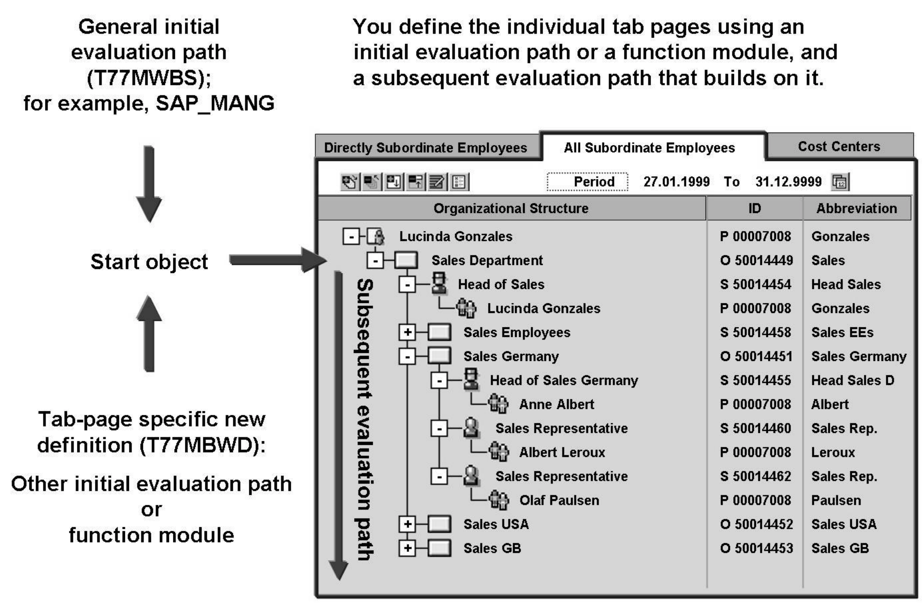

Figure 18: Defining Evaluation Paths

As well as tailoring the functions in the function tree, you can change the display of your area of responsibility to suit your requirements. You can do this by defining your own views/evaluation paths.

In Customizing, you specify evaluation paths in order to define the different views of the user's organizational area of responsibility. The system displays these views on tab pages on the right of the screen. To define the views you need an initial evaluation path and a subsequent evaluation path that builds on it. First, the initial evaluation path

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determines the start objects for the tab page in question. Starting from the start objects, the system takes a subsequent evaluation path to build up a set of objects in the form of a hierarchical structure. You can also determine start objects over a function module.

After determining the start objects for the tab pages, you enter the subsequent evaluation path to specify the set of objects for the corresponding hierarchical structure. You do this under *Determine Views per Category → Redefine Views (Evaluation Paths)*. By making this entry (T77MWBK), you remove the standard entries in the category and have the option of saving your own evaluation paths. Each tab page corresponds to exactly one table entry in this step. You can display up to 12 evaluation paths for each scenario.

When you define the tab pages (subsequent evaluation paths), you can also store with the “"Standard Initial Evaluation Path"” (table T77MWBS) alternative methods for determining the start objects You can use other initial evaluation paths (*Start Objects Evaluation Path*) or a function module (*Start Objects Function*).

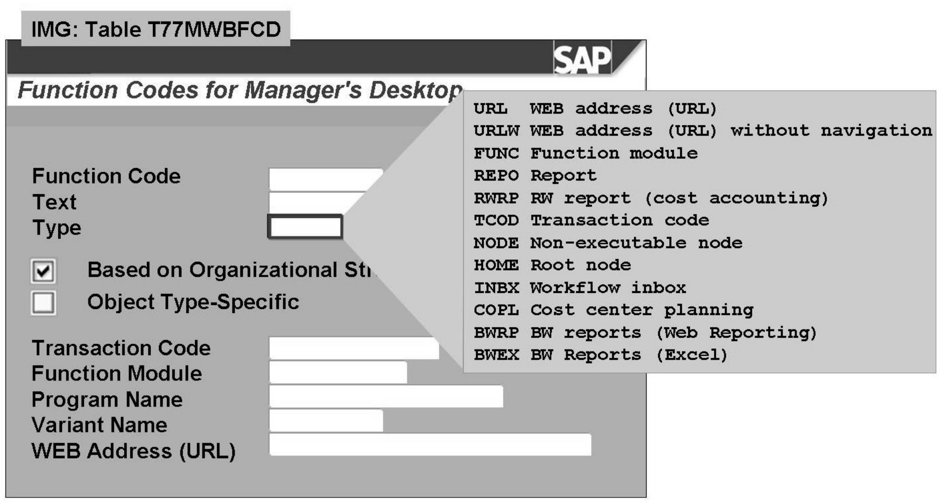

Figure 19: Inserting Theme Categories and Function Codes I

You can adjust, hide, regroup, or redefine the theme categories (type **Home**), the subcategories (type **Node**), or the functions themselves. However, the system can only display a maximum of eight theme categories (function codes of the highest hierarchical level) on the initial screen of a scenario.

You do this in Customizing under the IMG node *Enhancement of Function Codes*. Here you find all the settings for adjusting function codes to suit your requirements and, if necessary, for redefining them.

In the *Define function codes* step you specify the function codes that you need for your application scenario in addition to the existing ones. The corresponding table is not scenario-dependent, and therefore includes all possible functions. We use function codes to give give unique technical names to the nodes in the function tree on the left of the screen.

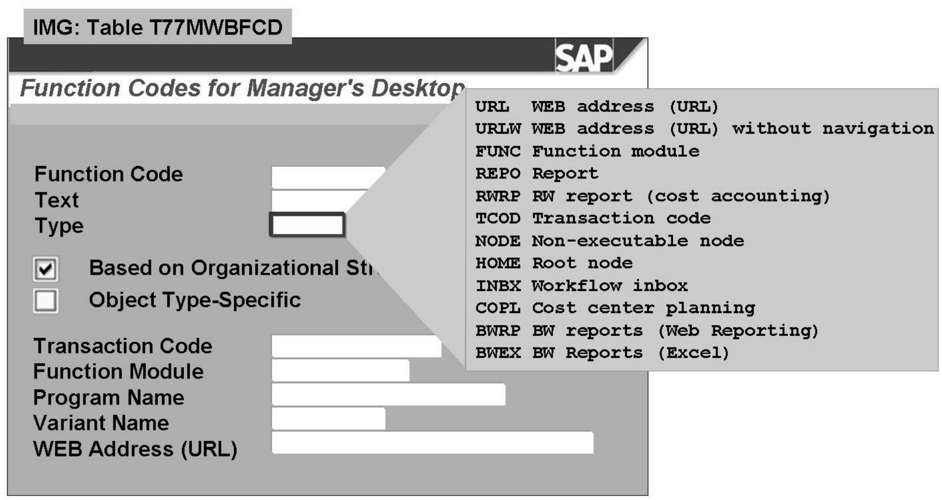

Figure 20: Inserting Theme Categories and Function Codes II

The functions can be of different **types** - depending on the technology used in the function you call up. Function codes serve as keys that uniquely describe the functions (start report, function module, or transaction, follow URL, display Workflow inbox) that a user can choose.

When you call up reports that use the HR logical databases (PNP, PCH, and PAP), the system automatically supplies the objects you select. When that happens, the system skips the selection screen.

Example: You have added new fields to the **Personal Data** infotype and written a report based on logical database PNP to evaluate those fields. You can make this report available as a function in the Manager's Desktop. In staff assignments in Manager's Desktop, the user chooses the people for whom he or she wants to start the report. The system does not display the report's selection screen.

There are also function codes that are needed for grouping functions and do not trigger a system activity. These entries, of type *HOME and NODE, serve only to structure the menu tree. For that purpose, in the Define Structure of Function Codes step, you group together a subset of all functions* into a hierarchical structure to form a particular *Manager's Desktop* application scenario.

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Wizard for Defining Function Codes

- Features:
  - Creating categories
  - Creating and assigning subcategories
  - Creating and assigning executable functions

When defining function codes you can use the **Wizard for Defining Function Codes**, which takes you through the required procedures. The wizard can create new function codes and position them in the hierarchy. However, it cannot hide or move existing entries.

You can only do that in the second step, Define Function Codes.

Important MDT Customizing Tables

Table	Short Name
T77MWBD	Evaluation Paths in Manager's Desktop Framework
T77MWBDTC	Customer-Specific Texts for Evaluation Paths in MDT
T77MWBFCC	Customer-Specific Override for MDT Function Codes
T77MWBFCD	Function Codes for Manager's Desktop
T77MWBFCH	Function Code Hierarchies for Manager's Desktop
T77MWBFCO	Object Type-Dependent Function Codes for Manager's Desktop
T77MWBFHC	Customer-Specific Arrangement of Function Codes in MDT
T77MWBFTC	Customer-Specific Text for MDT Function Codes
T77MWBK	Customer-Specific Evaluation Paths per Category in MDT
T77MWBKS	Evaluation Paths for Each Category in Manager's Desktop
T77MWBS	Manager's Desktop Scenarios
T77MWBSC	Manager's Desktop: Scenario-Specific Settings
T77MWBBWS	BW System Data for Manager's Desktop

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Exercise 4: Customizing Manager's Desktop

Exercise Objectives

After completing this exercise, you will be able to:

- Understand Customizing of Manager's Desktop
- Create a new Manager's Desktop scenario
- Create tab pages with new evaluation paths
- Define function codes for your new scenario

Business Example

Your Personnel and Organization department wants to integrate the newly created object type““Training Group””, into the Manager’s Desktop interface. This would offer managers an easy tool with information about the assignments of the various employees.

At the same time they are considering whether it would be better to provide different scenarios for different groups of managers in the enterprise. It is your task to test Manager’s Desktop in a new scenario, as a pilot project.

Task 1:

1. Create a new Manager’s Desktop scenario with the categories **Employees** and **Organization**. Use the Manager’s Desktop standard scenario *MWB1* as a template.
2. Use the **key ZM##** for your scenario.
3. Copy tab page *All Subordinate Employees* with evaluation path *MDTSBESX* and tab page *Directly Subordinate Employees* with evaluation path *MDTSBES*. Define your own tab page with your evaluation path *ZBES##* from the previous units. Name the tab page *Training Group ##* and use *MDT_ORGS* as the column group.
4. For your scenario, define your own function code hierarchy for the categories **Employee (Standard)** and **Organization (Info)**. You can base this on the hierarchy of the scenario *MWB1*. Use the following function codes:

Continued on next page

Sce-nario	Superordinate FCode	No	Function Code	Function Module
MWB1		1	STANDARDFUNCTION	
MWB1		2	INFO	
MWB1	HIS	1		HR_HIS_READ
MWB1	INFO	0	ORG_IPA_NODE	
MWB1	ORG_IPA_NODE	5	POSITIONMODIFY	
MWB1	ORG_IPA_NODE	10	RHFILLPOS	
MWB1	ORG_IPA_NODE	15	ORGCHANGEUNDO	
MWB1	ORG_IPA_NODE	20	ACROSS_BORDER_MOVE	
MWB1	ORG_IPA_ NODE	25	REORG	
MWB1	PA_PD_AP	10	APPRAISAL_DISPLAY	
MWB1	PA_PD_AP	20	APPRAISAL_CREATE	
MWB1	PA_PD_QR	10	ORG_QUALI_OVERVIEW	
MWB1	PA_PD_QR	15	ORG_QUALI_MAINTAINED	
MWB1	PA_PD_QR	20	PERS_PROFILE	
MWB1	PA_PD_QR	30	POS_PROFILE	
MWB1	PA_PD_QR	40	PERS_PROFILE_MATCHUP	
MWB1	REORG	1	SET_DRAG_SOURCES	
MWB1	REORG	2	SET_DROP_TARGET	
MWB1	STANDARDFUNCTION	1	ADHOC	
MWB1	STANDARDFUNCTION	2	HIS	
MWB1	STANDARDFUNCTION	4	PA_PD_AP	
MWB1	STANDARDFUNCTION	5	PA_PD_QR	

5. Check your Customizing in Manager's Desktop. To do this, you must store your scenario in the *User Settings* under the parameter *MWB_SCEN*, and restart Manager's Desktop.

Caution: The values in the user parameters are **case sensitive**.

Continued on next page

Task 2:

Maintaining a Scenario

1. Hide one of the function codes in your scenario.
2. Add the tab pages *Directly Reporting Employees, Cost Centers, and Directly Subordinate Employees to your scenario*.

   Reduce the number of views in the Employees category so that only *Directly Subordinate Employees remains*. In the *Organization* category, however, all views should remain displayed.
3. Create a *Theme Category* with the name of your enterprise and enhance the function codes by adding your enterprise's homepage. To do this, use the *Wizard for Defining Function Codes*.

Solution 4: Customizing Manager's Desktop

Task 1:

1. Create a new Manager's Desktop scenario with the categories **Employees** and **Organization**. Use the Manager's Desktop standard scenario *MWB1* as a template.

   a) Call up the SAP Implementatiion Guide using the menu path

      Tools → AcceleratedSAP → Customizing → Project Management → SAP Reference IMG. Select in *IMG → Personnel Management → Manager's Desktop*

2. Use the **key ZM##** for your scenario.

   a) Creating a new scenario sleect and navigate via *Customer Adjustment → Specify Scenario-Specific Settings → Define Application Scenarios* to the screen *Change Manager's Desktop Scenarios: Overview*

      By *Copying* the standard scenario *MWB1*, create your own scenario. Name it *ZM##*.

3. Copy tab page *All Subordinate Employees* with evaluation path *MDTSBESX* and tab page *Directly Subordinate Employees* with evaluation path *MDTSBES*. Define your own tab page with your evaluation path *ZBES##* from the previous units. Name the tab page *Training Group ##* and use *MDT_ORGS* as the column group.

   a) **Creating the tab pages for the new scenario**

      To create tab pages for the new scenario, select *Customer Adjustment → Define Views of Organizational Structure Determine Views* (Evaluation Paths). The Change *Evaluation Paths for Manager's Desktop: Overview* screen appears. To copy the entries from *MWB1* for your own scenario ZM## (for example *All Subordinate Employees* with the evaluation path *MDTSBESX*). Choose *New Entries* to define a new tab page with your evaluation path *ZBES##* from the previous unit. Name the tab page *Training Group ##* and keep the column group *MDT_ORGS*.

4. For your scenario, define your own function code hierarchy for the categories **Employee (Standard)** and **Organization (Info)**. You can base this on the hierarchy of the scenario *MWB1*. Use the following function codes:

Continued on next page

Sce-nario	Superordinate FCode	No	Function Code	Function Module
MWB1		1	STANDARDFUNCTION	
MWB1		2	INFO	
MWB1	HIS	1		HR_HIS_READ
MWB1	INFO	0	ORG_IPA_NODE	
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MWB1	ORG_IPA_NODE	10	RHFILLPOS	
MWB1	ORG_IPA_NODE	15	ORGCHANGEUNDO	
MWB1	ORG_IPA_NODE	20	ACROSS_BORDER_MOVE	
MWB1	ORG_IPA_ NODE	25	REORG	
MWB1	PA_PD_AP	10	APPRAISAL_DISPLAY	
MWB1	PA_PD_AP	20	APPRAISAL_CREATE	
MWB1	PA_PD_QR	10	ORG_QUALI_OVERVIEW	
MWB1	PA_PD_QR	15	ORG_QUALI_MAINTAINED	
MWB1	PA_PD_QR	20	PERS_PROFILE	
MWB1	PA_PD_QR	30	POS_PROFILE	
MWB1	PA_PD_QR	40	PERS_PROFILE_MATCHUP	
MWB1	REORG	1	SET_DRAG_SOURCES	
MWB1	REORG	2	SET_DROP_TARGET	
MWB1	STANDARDFUNCTION	1	ADHOC	
MWB1	STANDARDFUNCTION	2	HIS	
MWB1	STANDARDFUNCTION	4	PA_PD_AP	
MWB1	STANDARDFUNCTION	5	PA_PD_QR	

a) Choose *Enhancement of Function Codes → Define Structure of Function Codes →Define Function Code Hierarchies→*. The Change View “Function Code *Hierarchies for Manager’s Desktop: Overview” screen appears.*

Select the function codes and nodes listed in the following table. Use the *Copy* function to include these function codes in your scenario.

Continued on next page

Sce-nario	Superordinate FCode	No	Function Code	Function Module
ZM##		1	STANDARDFUNCTION	
ZM##		2	INFO	
ZM##	HIS	1		HR_HIS_READ
ZM##	INFO	0	ORG_IPA_NODE	
ZM##	ORG_IPA_NODE	5	POSITIONMODIFY	
ZM##	ORG_IPA_NODE	10	RHFILLPOS	
ZM##	ORG_IPA_NODE	15	ORGCHANGEUNDO	
ZM##	ORG_IPA_NODE	20	ACROSS_BORDER_MOVE	
ZM##	ORG_IPA_NODE	25	REORG	
ZM##	PA_PD_AP	10	APPRAISAL_DISPLAY	
ZM##	PA_PD_AP	20	APPRAISAL_CREATE	
ZM##	PA_PD_QR	10	ORG_QUALI_OVERVIEW	
ZM##	PA_PD_QR	15	ORG_QUALI_MAIN-TAINED	
ZM##	PA_PD_QR	20	PERS_PROFILE	
ZM##	PA_PD_QR	30	POS_PROFILE	
ZM##	PA_PD_QR	40	PERS_PRO-FILE_MATCHUP	
ZM##	REORG	1	SET_DRAG_SOURCES	
ZM##	REORG	2	SET_DROP_TARGET	
ZM##	STANDARDFUNCTION	1	ADHOC	
ZM##	STANDARDFUNCTION	2	HIS	
ZM##	STANDARDFUNCTION	4	PA_PD_AP	
ZM##	STANDARDFUNCTION	5	PA_PD_QR	

5. Check your Customizing in Manager's Desktop. To do this, you must store your scenario in the *User Settings* under the parameter *MWB_SCEN*, and restart Manager's Desktop.

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Caution: The values in the user parameters are **case sensitive**.

a) Check your Customizing in the *SAP Easy Access* Menu. In your user settings, store the parameter *MWB_SCEN* with the value *ZM##*, and start *Manager's Desktop*. If you have not made any mistakes up to now, you reach your new MDT scenario.

Task 2:

Maintaining a Scenario

1. Hide one of the function codes in your scenario.

   a) Go back to Manager's Desktop Customizing and choose *Enhancement of Function Codes → Define Structure of Function Codes → →Change Arrangement of Function Codes→. The Customer-Specific Arrangement of Function Codes in MDT: Detail screen appears.* Here, you select a function code that belongs to your scenario, and choose *Function Code Hidden*.

      Hint: In this way you can quickly eliminate unnecessary function codes from existing Manager's Desktop scenarios.

      Check your setting in Manager's Desktop.

2. Add the tab pages *Directly Reporting Employees, Cost Centers, and Directly Subordinate Employees to your scenario*.

   Reduce the number of views in the Employees category so that only *Directly Subordinate Employees remains*. In the *Organization* category, however, all views should remain displayed.

   a) Add more tab pages to your scenario by choosing *Customer Adjustment → Define Views of the Organizational Structure → Determine Views (Evaluation Paths)* to get to the *Change Manager's Desktop: Overview screen*, and copying more entries from *MWB1*.

      For the category *Employees*, reduce the number of views. Do this by choosing *Determine Views per Category→ Redefine Views (Evaluation Paths)* and →storing an evaluation path specific to your scenario. The others are no longer displayed in this category.

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3. Create a *Theme Category* with the name of your enterprise and enhance the function codes by adding your enterprise's homepage. To do this, use the *Wizard for Defining Function Codes*.

   a) To create new function codes, choose *Enhancement of Function Codes Wizard for Defining Function Codes*. Read the introduction and choose *Continue*. Choose *Executable Function*, and in the next wizard step choose your scenario *ZM##*. Give the new function code a meaningful technical key and a descriptive name. In the next step, specify the position of your new function code. Do this by choosing a Theme Category and a Superior Category.

      Then you specify the type of function. Choose *www Address with Navigation* and store the homepage of your enterprise.

      Choose *Continue*, Save *Entries to Database*, and on the next screen choose *Complete*.

Lesson Summary

You should now be able to:

- Adjusting the Manager's Desktop
- Include your own function codes
- Redefine SAP standard scenarios

Unit Summary

You should now be able to:

- Adjusting the Manager's Desktop
- Include your own function codes
- Redefine SAP standard scenarios

Unit 4

Workflow and Organizational Management

Unit Overview

This unit is concerned with the relationship betweeen Organizational Management and Workflow. This provides an overview of how the two components work together technically. The workflows in Organizational Managment serve as an example for this

Unit Objectives

After completing this unit, you will be able to:

- Understand how workflows work
- Explain the workflows delivered with Organizational Management and
- Set up the workflow for organizational changes.

Unit Contents

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Lesson: Workflow and Organizational Management

Lesson Overview

- Workflow: design and sequence of events
- Workflows delivered with Organizational Management
- Other aspects of integration

Lesson Objectives

After completing this lesson, you will be able to:

- Understand how workflows work
- Explain the workflows delivered with Organizational Management and
- Set up the workflow for organizational changes.

Business Example

Your company would like to integrate personnel administration and organizational management better. Workflow components of SAP Netweaver are to be used for this purpose.

This enables tasks to be relayed automatically between users and processes to be integrated better.

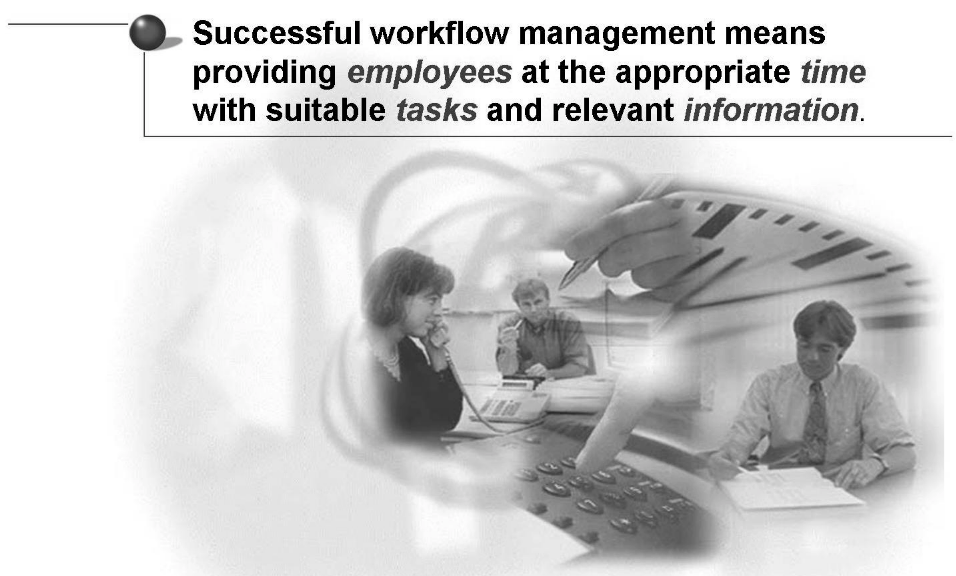

Figure 21: Workflow in One Sentence

In SAP Business Workflow the four process dimensions

- Organizational Plan (Who?)
- Sequence organization (When? In what order? Under what conditions?)
- Function (What?)
- Information (With what data?)

are related to each other so that business processes can run as efficiently as possible.

With the help of a graphical definition tool, you store the process you want to define as a workflow in the form of parameters in the system. At runtime, the **Workflow Manager**, in other words the SAP system, performs all the tasks that you thought up when defining the process. This frees the user from avoidable organizational tasks, and he or she can concentrate on the content of his or her work.

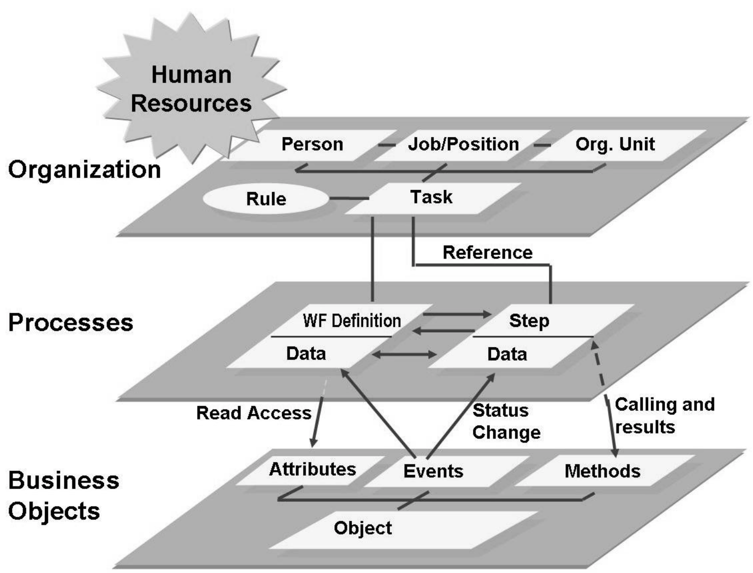

Figure 22: Workflow Management Architecture

SAP Business Workflow has a three-level architecture. Modulizing the components involved in this way allows a high level of flexibility.

At the lowest level is the **Business Object Repository**. In it are defined all the business objects that can be used in workflow definitions, along with their methods, attributes, and events. R/3 functions such as hiring an employee are available through business objects.

At the **process level**, the sequence in which tasks should be performed, and the rules governing the tasks are defined. Each task is represented by a workflow step. Object data, and information added during the process is passed on from step to step, or is available to the agents during the entire workflow. Process control enables you to execute steps sequentially, in parallel, as alternatives, or in a nested hierarchy.

The **organizational level** provides information about responsibilities and the personnel structure of the enterprise, so that tasks are forwarded to the correct agent at runtime.

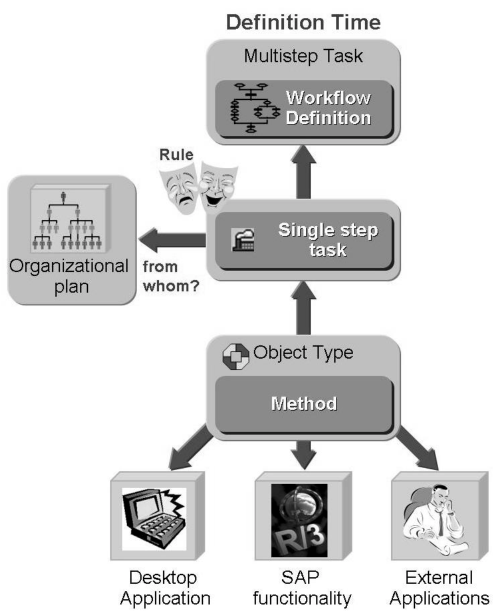

Figure 23: Workflow: Design and Sequence of Events I

The business process is stored in the workflow definition. Information is displayed by the *Event-Driven Process Chain (EPK)*.Basic elements in the Workflow Definition are single-step tasks.

Single-step tasks

- Represent SAP functionality from a business point of view
- Each use exactly one method

The foundation of SAP Business Workflow is object-oriented design. Objects are defined in the object repository, which is delivered by SAP. Object methods:

- represent SAP functionality from the point of view of the business object

  (technical view, e.g. create, delete, change)
- offer a uniform, transparent interface with SAP functionality

  (transactions, functinon module, report, ...)
- Allow you to encapsulate functionality

The agents responsible for an activity in workflow are defined either by an assignment to an object in the organizational plan, or with the help of a *rule*. Rules are used to determine responsible agents dynamically, in other words depending on information that is not available until runtime.

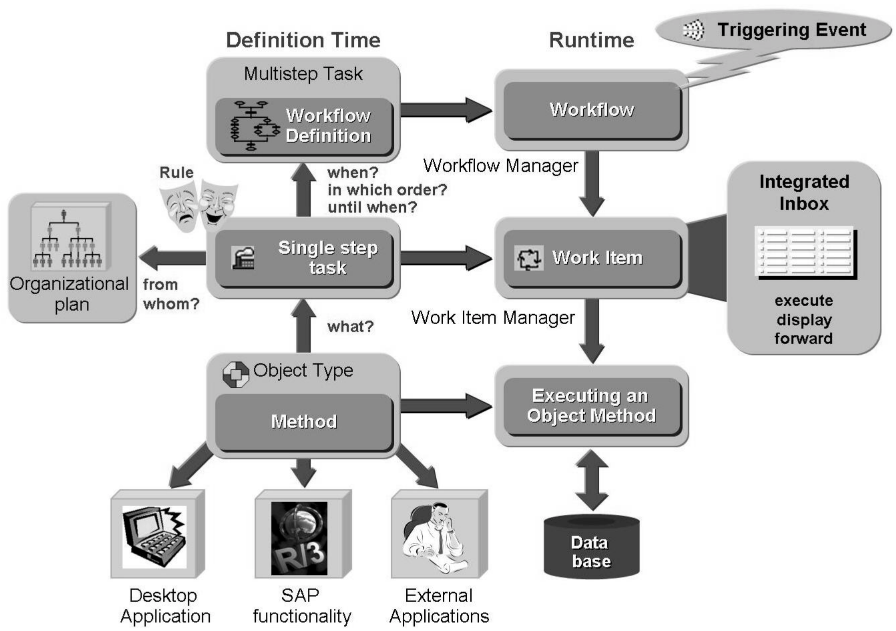

Figure 24: Workflow: Design and Sequence of Events II

Workflows are usually started by a triggering event. Events are used to make it known when the status of objects in the system changes. Like methods, events are defined in the object repository for each object type. Events are triggered in the individual applications.

Example: the **Workflow for Organizational Change (WS01000014)** is started like this: when you save an organizational change and enter an action, the event **Designation for Organizational Change** with object type **ORGCHEARM** is triggered by an entry in **table T77INT**.

Work items are the representation at runtime of a single-step task. The workflow manager passes them to the responsible agents.

If an agent accepts a work item for processing, it disappears from the inboxes of the other agents.

When the system executes a work item, it calls the corresponding object method (in the above example, this is the personnel action **Organizational Change**).

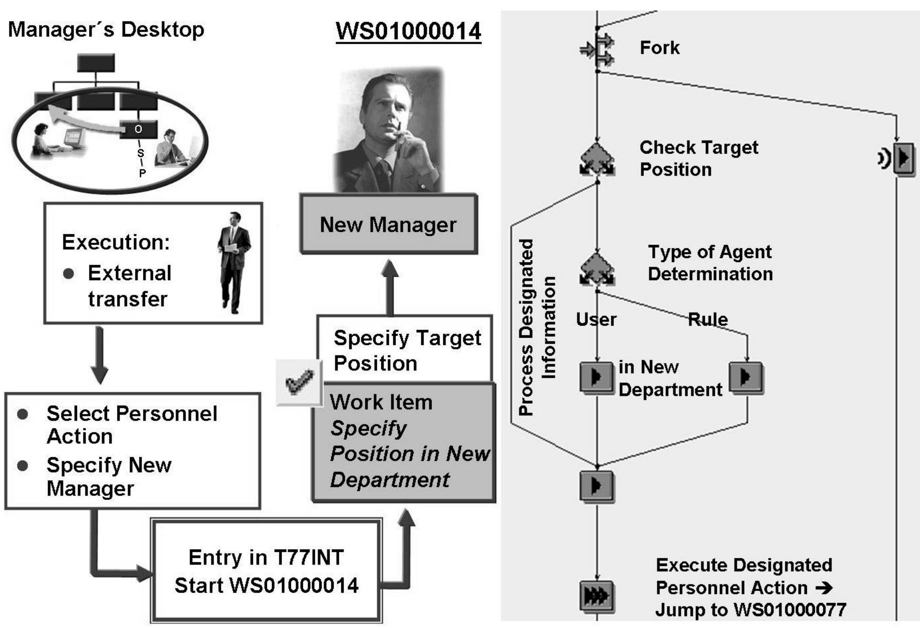

Figure 25: 1. Standard Workflows: Workflow for Organizational Changes

Using this workflow template you can execute a designated personnel action (for example, an “organizational change”). If event linkage is activated for the event ORGCHEARM.CREATED, the system automatically starts the workflow template when you designate the corresponding personnel action (in table T77INT).

This is the case, for example, in **Manager's Desktop (MDT)** and on the **Organization and Staffing** interface, if you move an organizational object under a new object, and one or more employees (people) are affected.

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The authorizations functionality in MDT means that the user cannot see the new target position of the employee he or she is reassigning. For this reason, the system first requires the user to enter the new organizational unit, or the head of the new organizational unit. The head of the organizational unit then receives a work item for specifying the new position in his or her area of responsibility.

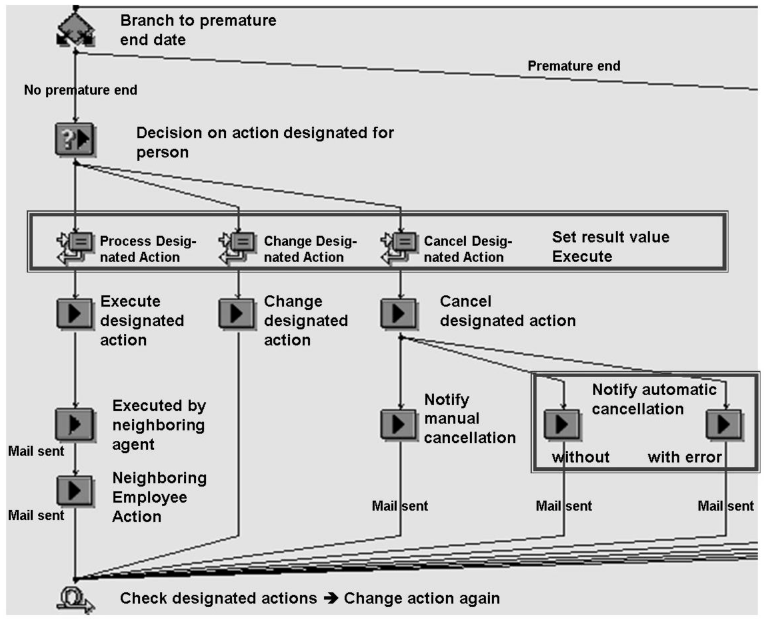

Figure 26: 2. Standard Workflows: Workflow for Organizational Changes II

The work item regarding the decision on how to proceed with the action (execute, change, or cancel it) is sent to the inbox of the personnel administrator responsible for the employee. For this to work, an administrator must be entered in the HR master data of the employee in question. In addition, the administrator must be assigned to an R/3 user in infotype 0105, and this user must be maintained in table T526.

The personnel administrator responsible can change the action as long as the personnel number of the employee being reassigned is entered in table T77INT.

When the action has been executed, both the employee affected and the personnel administrator are informed by mail. For this to work, the employee affected must be assigned via infotype 0105 to an R/3 user in HR master data.

If the administrator responsible wants to cancel the action, and an automatic cancellation is not possible, the administrator is informed by mail. If that is the case, the already-executed employee transfer must be undone by hand in Organizational

Management or Manager's Desktop. Relevant information is contained in the mail to the personnel administrator. If an automatic cancellation results in an error, the personnel administrator is also informed.

Set up the Workflow **WS 01000014** and **WS01000077** (execute designated personnel action) in Customizing under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014)* or under *IMG → Personnel Management → Manager's Desktop → Organisational Changes → Workflow for Organizational Change (WS01000014)*.

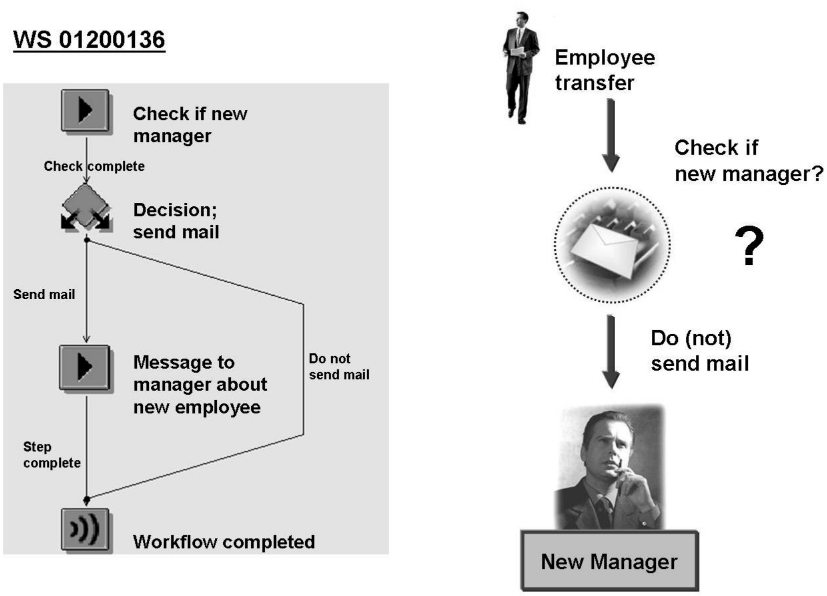

Figure 27: Standard Workflows: Workflow for New Employee

Set up the Workflow **WS 01200136** (message about new employee) in Customizing under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow Message about New Employee (WS01200136) or under Personnel Management → Manager's Desktop → Organizational Changes → Workflow Message about New Employee (WS01200136)*.

In the mail generated for this workflow, you can save your own text in which you inform the new manager of the required actions. The text saved in the standard is as follows: “On MM.DD.YYYY, the employee *NAME* will start work in your department. Please consider all the required activities on this date.”

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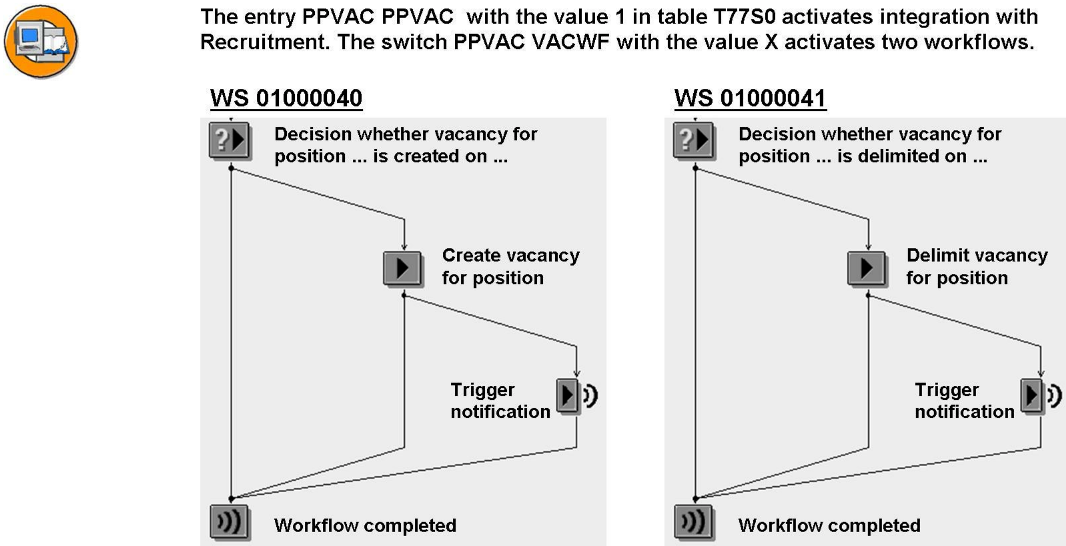

Figure 28: Standard Workflows: Create Vacancy, Delimit Vacancy

With the entry **PPVAC PPVAC** with value **1** in table T77S0 you can specify whether a position is only considered to be vacant if a Vacancy infotype (1007) exists for it, or whether all unoccupied positions are considered vacant. If the system evaluates infotype 1007, it activates integration with **Recruitment** at the same time. If you create an infotype 1007 for a position, the system creates a record in table T750X in Personnel Administration. This creates the interface with Recruitment.

The workflows **WS 01000040** (Create Vacancy for Position) and **WS 01000041** (Delimit Vacancy for Position) are activated by the entry **PPVAC VACWF**. If you set this switch to X, no dialog box appears for creating a vacancy when you change the staffing percentage of a position - for example when maintaining the organizational plan. Instead, the system generates an event, which - combined with appropriate Customizing - starts a workflow.

- According to this workflow (WS 01000040) the head of the organizational unit to which the position in question is assigned receives the decision on creating a vacancy.
- If switch is set to 'X', this means that this head receives a workflow

(WS 01000041) regarding the decision about delimiting a vacancy.

You can find the Customizing activity in the implementation guide under *Personnel Management → Organization Management → Infotype settings → Activate/Deactivate "Vacancy" Infotype*.

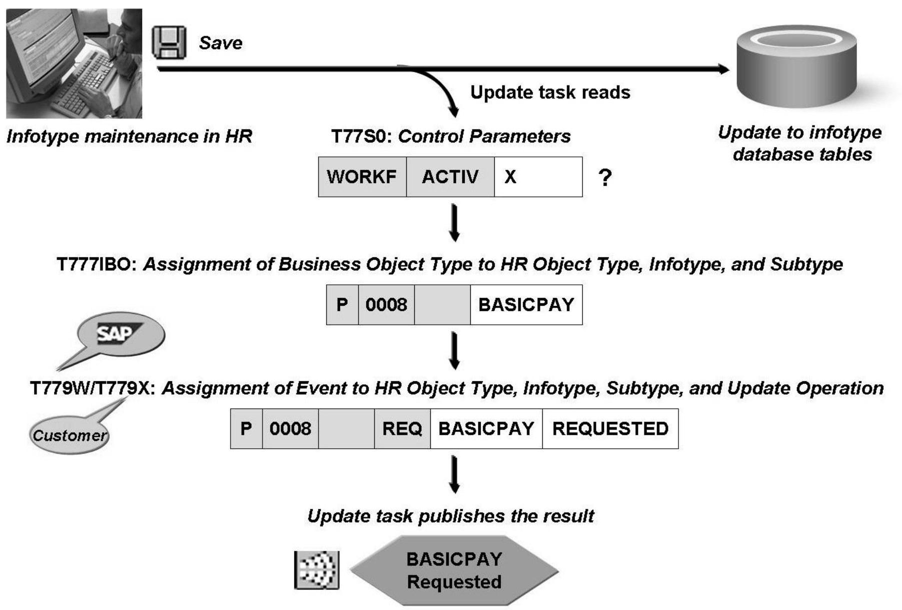

Figure 29: Workflow: Generating Events while Updating Infotypes

Workflow: Generating Events Dynamically

Events that announce status changes to HR infotypes are generated in the infotype update task.

The prerequisite for this is that event generation is activated in the control table T77S0 (entry WORKF ACTIV = X).

In table T779W (SAP) or T779X (customer) is the information about which event should be generated. Table T777IBO contains the assignment of business object type to HR object type, infotype, and subtype.

By entering a function module, you can have the system perform extra checks before it generates an event. Here, the triggering event can be specified dynamically.

You can maintain the tables mentioned within activities in the Implementation Guide. You can find these activities under *IMG → Personnel Management → Personnel Administration → Tools → Business Workflow Events*

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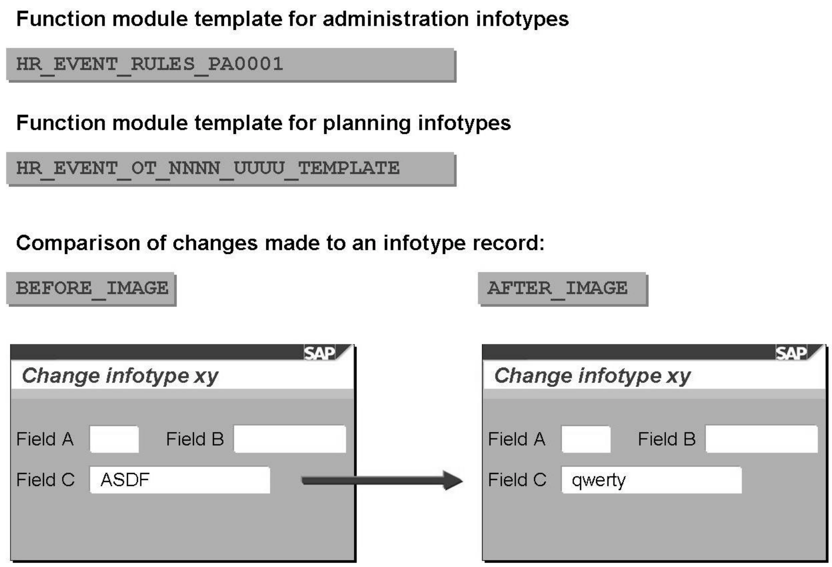

Figure 30: Workflow: Generating Events Dynamically

You can control event generation dynamically - in other words, at runtime - if, instead of an event, you store a function module programmed by you in table T779X. The update task calls this function module, which executes additional checks and returns the triggering event to the update task.

SAP delivers a function module template for Personnel Administration infotypes, and one for Personnel Planning infotypes. Copy this template to your namespace, and in the new function module, save the checks that you want to execute.

Over the interface of the function module, you receive the parameters "BEFORE_IMAGE" and "AFTER_IMAGE", which contain the infotype data before and after the user processed it in infotype maintenance. By executing a comparison of these two parameters you can, for example, specify that the system should only generate an event if the content of a particular field has changed.

Exercise 5: Workflow and Organizational Management

Exercise Objectives

After completing this exercise, you will be able to:

- Set up and understand the workflow for organizational changes.

Business Example

You want to set up the workflow for organizational changes, so that when a line manager transfers one of his or her employees to another department using Manager's Desktop, the process is automated as far as possible. The four people who participate in a transfer in your enterprise are: the employee being transferred, his or her personnel administrator, the current manager, and the new manager.

For these exercises and solutions, training course participants are divided into three groups, each of which takes on a different function. The three functions are: Manager 1, Manager 2, and Administrator. The individual functions and their tasks are described in the following. Each task is divided into a Customizing and an application part. You start with the Customizing part.

Task 1:

Instructions for Manager 1

Description of activities of manager 1:

Manager 1 is the line manager of the employee being transferred, and uses Manager's Desktop to transfer the employee to Manager 2's department. To do this, he or she chooses the **Transfer Outside** function in the **Organization** theme category.

1. On the **Organization and Staffing interface**, relate your user **HR506-##** to the chief position of your organizational unit ## Executive Board. Save your entries.
2. In **Infotype 0001 (Organizational Assignment)**, in the *Administrator* section, assign all your *employees* to *Group CABB* field, and to **Group ##** (the group taking the role of the personnel administrator in this exercise) in the PersAdmin field.
3. When you have completed these preparations, help the **Administrator** and **Manager 2** with their preparations. You cannot start to execute the workflow until all three teams have finished their preparations.

Continued on next page

Task 2:

Instructions for Manager 2

Description of activities of manager 2:

Manager 2 is the new line manager of the employee being transferred, and assigns the new position to the employee.

1. On the **Organization and Staffing interface**, relate your user **HR506-##** to the chief position of your organizational unit ## Executive Board. Save your entries.
2. Enter your user **HR506-##** as the system user name for employee `Jose Vega (personnel number 540997##)` 540997##) in **Group** ## for Manager 1 in infotype 0105. Use **Subtype 0001 System User Name SAP System (SY-UNAME)**.

   Save your entries.
3. In the IMG, set up yourself as agent for the standard task, *Specify Position in New Department*, in the *Workflow for Organizational Change (WS01000014)*. You do this under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) → execute* on the *Overview: Task Assignment* Screen. There, you perform the activity *Assign Agents to Tasks*. In the *View* menu, display the keys, in other words the object IDs. As agent type, use the type *User*, and enter your user name `HR506-##`. Then, choose the appropriate button on the application function bar to generate an *Index*.

   Use the opportunity to check whether event linkage is activated for the workflow.
4. Check the settings for the switches *PLOGI EVENB Enhanced Integration* and *PLOGI EVCRE* Generate Event with Entry T77INT (Action Designated) in Organizational Management *Customizing*. Ensure that the settings are activated.
5. When you have completed these preparations, help the *Administrator* and *Manager 1* with their preparations. You cannot start to execute the workflow until all three teams have finished their preparations.

Continued on next page

Task 3:

Instructions for administrator

Descriptions of activities of administrator:

The Administrator is the agent in the personnel department who is responsible for the employee being transferred. He or she executes the designated action, changes it, or cancels it. Only then is the transfer effective in Organizational Management and in Personnel Administration.

1. Set up yourself as the agent for all standard tasks of the workflow template WS01000077 Execute Designated Personnel Action. You do this under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) → execute* on the *Overview: Task Assignment* screen. There, you perform the activity *Assign Agents to Tasks*. In the *View* menu, display the keys, in other words the object IDs. Go to the sub-workflow *WS01000077 Execute Designated Personnel Action.* As agent type, use the type *User*, and enter your user name **`HR506-##`**. When you have made these changes, choose the appropriate button on the application function bar to generate an *Index*.
2. Check in table T526 whether your group ## and user are entered as a personnel administrator there.
3. Check whether all employees belonging to the organizational unit of your Manager 1's group are assigned to the *group CABB* in the *Administrator* field of *Infotype 0001* Organizational Assignment. Make sure that your group is entered as the Personnel Administrator.

Task 4:

When you have set up and checked the Customizing together, you can execute the workflow. Any Customizing errors will now come to light. If your transfer via workflow does not work on the first try, check your Customizing together with the other two groups. There can often be problems due to missing user assignments. Check these first.

In Manager 1's organizational unit there are several employees for whom you can run the transfer.

1. **Instructions for Manager 1**

   Instructions for Manager 1By Drag&Relate, transfer the employee Jose Vega (personnel number 540997##) on the first of the next month from your position *Foreman* to the organizational unit ## *Executive Board* of group ##, which is

Continued on next page

headed by Manager 2. In the dialog box *Transfer Across Areas of Responsibility*, use *Action 02* and *User* of New Manager HR506-## to assign Jose Vega to his new department. When you have made those entries, save the transfer.

Manager 2 should now have a work item in his or her inbox.

When the entire workflow has been executed, you receive a mail for Jose Vega in your *Business Workplace Inbox* as an *Unread Document*.

2. **Instructions for Manager 2**

   When Manager 1 has transferred the person Jose Vega (personnel number 540997##) to you, you will find in your Manager's Desktop, in the **Workflow Inbox** theme category, the notification Enter *New Position for Employee 540997##*. Execute the work item and assign your occupied *position ## Foreman* to the person Jose Vega. Save your entries and end the work item.

   The work item is no longer visible in your inbox and is forwarded to the personnel administrator. The administrator must now process the work item.

   If you cannot execute the work item immediately, you must refresh the **organizational environment**. To do this choose *Settings→ Workflow Settings → Refresh Organizational Environment*.

3. **Instructions for administrator:**

   Instructions for the AdministratorWhen Manager 2 has assigned the person Jose Vega (personnel number 540997##) to a new position, you receive the work item *Decision on Designated Action for Person 540997## on 01.mm.yyyy*. Process the work item and execute the designated action. In the personnel action that the system now calls up, accept the default values for IT0000 Actions and IT0001 Organizational Assignment. In infotype 0001, assign the employee 100 percent to the new position. End the work item.

   The work item is no longer visible in your inbox. You and the employee in question receive an *Unread Document in your inbox*.

   If you cannot execute the work item immediately, you must refresh the **organizational environment**. To do this choose *Settings→ Workflow Settings → Refresh Organizational Environment*.

Solution 5: Workflow and Organizational Management

Task 1:

Instructions for Manager 1

Description of activities of manager 1:

Manager 1 is the line manager of the employee being transferred, and uses Manager's Desktop to transfer the employee to Manager 2's department. To do this, he or she chooses the **Transfer Outside** function in the **Organization** theme category.

1. On the **Organization and Staffing interface**, relate your user **HR506-##** to the chief position of your organizational unit ## Executive Board. Save your entries.

   a) Choose *SAP Easy Access→ Human Resources → Organizational Management → Organizational Plan → Organization and Staffing* and relate your user **HR506-##** to the chief position of your organizational unit **## Executive Board**. You do this by double-clicking on the position in the overview area, and choosing the **Assign** button to relate the **user HR506-##** to the position. Save your entries.

2. In **Infotype 0001 (Organizational Assignment)**, in the *Administrator* section, assign all your *employees* to *Group CABB* field, and to **Group ##** (the group taking the role of the personnel administrator in this exercise) in the PersAdmin field.

   a) In **Infotype 0001** Organizational Assignment, in the *Administrator* field, assign all your employees to the *CABB group*. To see Infotype 0001 Organizational Assignment, choose *SAP Easy Access→ Human Resources → Personnel Management → Administration → HR Master Data → Maintain*. In the *object manager*, call up the employees in your organizational unit and choose an employee by double-clicking. Select **Infotype 0001 Organizational Assignment** and choose the *Change* button in the application function bar. Under *Personnel* Administrator, use input help to choose *Group ##* (the group that has taken on the Administrator function in the exercises).

Continued on next page

3. When you have completed these preparations, help the **Administrator** and **Manager 2** with their preparations. You cannot start to execute the workflow until all three teams have finished their preparations.

   a) When you have completed these preparations, help the Administrator and Manager 2 with their preparations. You cannot start to execute the workflow until all three teams have finished their preparations.

Task 2:

Instructions for Manager 2

Description of activities of manager 2:

Manager 2 is the new line manager of the employee being transferred, and assigns the new position to the employee.

1. On the **Organization and Staffing interface**, relate your user **HR506-##** to the chief position of your organizational unit ## Executive Board. Save your entries.

   a) Choose *SAP Easy Access→ Human Resources → Organizational Management → Organizational Plan → Organization and Staffing* and relate your user HR506-## to the chief position of your organizational unit ## Executive Board. You do this by double-clicking on the position in the overview area, and choosing the Assign button to relate the user **HR506-##** to the position. Save your entries.

2. Enter your user **HR506-##** as the system user name for employee **`Jose Vega (personnel number 540997##)`** 540997##) in **Group ##** for Manager 1 in infotype 0105. Use **Subtype 0001 System User Name SAP System (SY-UNAME)**.

   Save your entries.

   a) Enter your user **HR506-##** as the system user name for employee **`Jose Vega (personnel number 540997##)`** for the **Group of your Manager 1 in infotype 0105** as system user name. To see Infotype 0105, choose *SAP Easy Access → Human Resources → Personnel Management → Administration → HR Master Data → Maintain*. In the *object manager*, call up the employees in Manager 1's organizational unit and choose Jose Vega by double-clicking. In the *Direct Selection* field, enter the **`infotype number 0105`** and create the infotype anew. Use **Subtype 0001 System User Name SAP System (SY-UNAME)** and enter your user **`HR506-##`** there.

      Save your entries.

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3. In the IMG, set up yourself as agent for the standard task, *Specify Position in New Department*, in the *Workflow for Organizational Change (WS01000014)*. You do this under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) → execute* on the *Overview: Task Assignment* Screen. There, you perform the activity *Assign Agents to Tasks*. In the *View* menu, display the keys, in other words the object IDs. As agent type, use the type *User*, and enter your user name **`HR506-##`**. Then, choose the appropriate button on the application function bar to generate an *Index*.

   Use the opportunity to check whether event linkage is activated for the workflow.

   a) You do this under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) → execute* on the *Overview: Task Assignment* screen. There, you perform the activity *Assign Agents to Tasks*. In the task group *Execute Designated Personnel Action*, in the workflow template *Execute Designated Personnel Action*, assign yourself as an agent for the standard task *Specify Position in New Department*. To do this, select the standard task and choose *Create Agent Assignment*. As agent type, use the type *User*, and enter your user name **HR506-##**. Then, choose the appropriate button on the application function bar to generate an *Index*.

      Use the opportunity to check whether event linkage is activated for the workflow.

4. Check the settings for the switches *PLOGI EVENB Enhanced Integration* and *PLOGI EVCRE* Generate Event with Entry T77INT (Action Designated) in Organizational Management *Customizing*. Ensure that the settings are activated.

   a) Choose *IMG→ Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Set Up Integration with Personnel Administration*, and then choose *Basic Settings*. The Change *View „“HR Master Data Integration”: Overview screen* appears. Check the settings for the switches *PLOGI EVENB* Enhanced Integration and *PLOGI EVCRE Generate Event with Entry T77INT (Action Designated)*. Both must be activated with a value X.

Continued on next page

5. When you have completed these preparations, help the *Administrator* and *Manager 1* with their preparations. You cannot start to execute the workflow until all three teams have finished their preparations.

   a) When you have completed these preparations, help the Administrator and Manager 1 with their preparations. You cannot start to execute the workflow until all three teams have finished their preparations.

Task 3:

Instructions for administrator

Descriptions of activities of administrator:

The Administrator is the agent in the personnel department who is responsible for the employee being transferred. He or she executes the designated action, changes it, or cancels it. Only then is the transfer effective in Organizational Management and in Personnel Administration.

1. Set up yourself as the agent for all standard tasks of the workflow template WS01000077 Execute Designated Personnel Action. You do this under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) → execute* on the *Overview: Task Assignment* screen. There, you perform the activity *Assign Agents to Tasks*. In the *View* menu, display the keys, in other words the object IDs. Go to the sub-workflow *WS01000077 Execute Designated Personnel Action.* As agent type, use the type *User*, and enter your user name **HR506-##**. When you have made these changes, choose the appropriate button on the application function bar to generate an *Index*.

   a) You do this under *IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) → execute* on the *Overview: Task Assignment* screen. There, you perform the activity *Assign Agents to Tasks*. In the *View* menu, display the keys, in other words the object IDs. In the task group *ExecuteDesignated Personnel Action*, in the workflow template *Execute Designated Personnel Action*, assign yourself as an agent for all the standard tasks displayed. To do this, select each standard task for your user by placing the cursor over the standard task in question and choose *Create Agent Assignment* in the application function bar. As agent type, use the type *User*, and enter your user name **HR506-##**. When you have made these changes, choose the appropriate button on the application function bar to generate an *Index*.

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2. Check in table T526 whether your group ## and user are entered as a personnel administrator there.

   a) Check table T526 from the System menu, by choosing *System→ Services → Table Maintenance → Enhanced Table Maintenance*. In Enhanced Table Maintenance, enter `T526` in the entry field and choose *Display*. Here, you should see an entry for your user with the name *Group ##*.

3. Check whether all employees belonging to the organizational unit of your Manager 1's group are assigned to the *group CABB* in the *Administrator* field of *Infotype 0001* Organizational Assignment. Make sure that your group is entered as the Personnel Administrator.

   a) Check whether all employees belonging to the organizational unit of your Manager 1's group are assigned to the *group CABB* in the *Administrator* field of *Infotype 0001* Organizational Assignment. Make sure that your group is entered as the Personnel Administrator. To see Infotype 0001 Organizational Assignment, choose *SAP Easy Access→ Human Resources → Personnel Management → Administration → HR Master Data → Maintain*.

Task 4:

When you have set up and checked the Customizing together, you can execute the workflow. Any Customizing errors will now come to light. If your transfer via workflow does not work on the first try, check your Customizing together with the other two groups. There can often be problems due to missing user assignments. Check these first.

In Manager 1's organizational unit there are several employees for whom you can run the transfer.

1. **Instructions for Manager 1**

   Instructions for Manager 1By Drag&Relate, transfer the employee Jose Vega (personnel number 540997##) on the first of the next month from your position *Foreman* to the organizational unit ## *Executive Board* of group ##, which is headed by Manager 2. In the dialog box *Transfer Across Areas of Responsibility*, use *Action 02* and *User* of New Manager HR506-## to assign Jose Vega to his new department. When you have made those entries, save the transfer.

   Manager 2 should now have a work item in his or her inbox.

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When the entire workflow has been executed, you receive a mail for Jose Vega in your *Business Workplace Inbox* as an *Unread Document*.

a) **Instructions for Manager 1**

Instructions for Manager 1, transfer the employee Jose Vega (personnel number 540997##) on the first of the next month from your position *Foreman* to the organizational unit ## *Executive Board* of group ##, which is headed by Manager 2. To do this, call Manager's Desktop and the theme category *Organization*, and drag the employee Jose Vega to the *Transfer Outside* function. In the dialog box *Transfer Across Areas of Responsibility*, use *Action 02* and *User* of New Manager HR506-## to assign Jose Vega to his new department. When you have made those entries, save the transfer.

Manager 2 should now have a work item in his or her inbox.

When the entire workflow has been executed, you will receive a mail for Jose Vega in your *Business Workplace Inbox* as an *Unread Document*.

2. **Instructions for Manager 2**

When Manager 1 has transferred the person Jose Vega (personnel number 540997##) to you, you will find in your Manager's Desktop, in the **Workflow Inbox** theme category, the notification Enter *New Position for Employee 540997##*. Execute the work item and assign your occupied *position ## Foreman* to the person Jose Vega. Save your entries and end the work item.

The work item is no longer visible in your inbox and is forwarded to the personnel administrator. The administrator must now process the work item.

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If you cannot execute the work item immediately, you must refresh the **organizational environment**. To do this choose *Settings→ Workflow Settings → Refresh Organizational Environment*.

a) **Instructions for Manager 2**

When Manager 1 has transferred the person Jose Vega (personnel number 540997##) to you, you will find in your Manager's Desktop, in the **Workflow Inbox** theme category, the notification Enter *New Position for Employee 540997##.* Execute the work item and assign your occupied *position ## Foreman* to the person Jose Vega. Save your entries and choose *Back* to go to your *Workflow Inbox*. A dialog box for the work item appears. In the box, complete the work item by choosing *Complete Work Item*.

The work item is no longer visible in your inbox and is forwarded to the personnel administrator. The administrator must now process the work item.

If you cannot execute the work item immediately, you must refresh the *organizational environment*. To do this choose *Settings→ Workflow Settings → Refresh Organizational Environment*.

3. **Instructions for administrator:**

Instructions for the AdministratorWhen Manager 2 has assigned the person Jose Vega (personnel number 540997##) to a new position, you receive the work item *Decision on Designated Action for Person 540997## on 01.mm.yyyy*. Process the work item and execute the designated action. In the personnel action that the system now calls up, accept the default values for IT0000 Actions and IT0001 Organizational Assignment. In infotype 0001, assign the employee 100 percent to the new position. End the work item.

The work item is no longer visible in your inbox. You and the employee in question receive an *Unread Document in your inbox*.

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If you cannot execute the work item immediately, you must refresh the **organizational environment**. To do this choose *Settings→ Workflow Settings → Refresh Organizational Environment*.

a) **Instructions for administrator:**

Instructions for the AdministratorWhen Manager 2 has assigned the person Jose Vega (personnel number 540997##) to a new position, you receive the work item **Decision on Designated Action for Person 540997## on 01.mm.yyyy**. Double-click on the item to open it for processing. Execute the designated action. In the personnel action that the system now calls up, accept the default values for **IT0000 Actions** and **IT0001 Organizational Assignment**. In infotype 0001, assign the employee 100 percent to the new position. You can cancel processing of the Planned Working Time and Basic Pay infotypes. Since the new position is already occupied, the system displays several messages asking you to confirm the working time and the staffing percentage. Confirm these by choosing *Enter*.

When the action is completed, the system displays the *Workflow Inbox* again. A dialog box for the work item appears. In the box, complete the work item by choosing *Complete Work Item*.

The work item is no longer visible in your inbox. You and the employee in question receive an *Unread Document in your inbox.*

If you cannot execute the work item immediately, you must refresh the **organizational environment**. To do this choose *Settings→ Workflow Settings → Refresh Organizational Environment*.

Lesson Summary

You should now be able to:

- Understand how workflows work
- Explain the workflows delivered with Organizational Management and
- Set up the workflow for organizational changes.

Unit Summary

You should now be able to:

- Understand how workflows work
- Explain the workflows delivered with Organizational Management and
- Set up the workflow for organizational changes.

Unit 5

Appendix

Unit Overview

The appendix of this course contains additional material on the subject Transports in Organizational Management and an overview of all paths and transactions used in this course.

All corresponding paths and transactions belonging to a unit serve as navigation aids and reference works. In some cases, you may demonstrate other transactions / Customizing settings in the system. No guarantee can therefore be given that all these settings are included here.

Unit Objectives

After completing this unit, you will be able to:

- Set up the transport connection for organizational objects
- Understand the principle underlying the transport
- Use reports to create a transport request for organizational objects

Unit Contents

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Lesson: Transports in Organizational Management

Lesson Overview

This lesson gives an overview of configuring the transport connection for objects of organizational management and gives a vivid presentation of the bases / principles for the transport of organizational objects. Reports for the transport of organizational objects are also discussed.

Lesson Objectives

After completing this lesson, you will be able to:

- Set up the transport connection for organizational objects
- Understand the principle underlying the transport
- Use reports to create a transport request for organizational objects

Business Example

You maintain your organizational plan in your development system, and want to transport changes to organizational objects from your development system to your productive system. To do this, you first gain an overview of the different ways of writing organizational objects to a transport request.

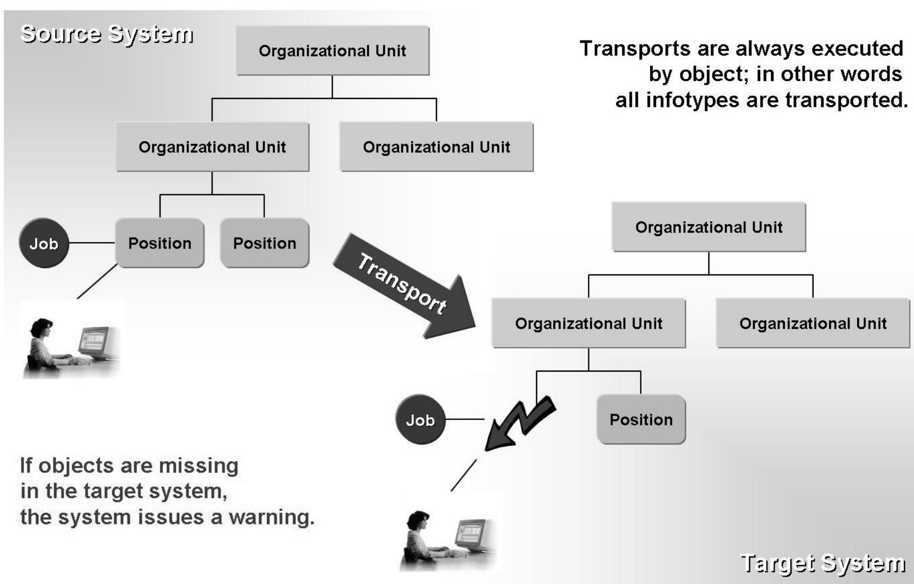

Figure 31: Transport Logic

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Regardless of the type of transport connection, the transport is always by object. In other words, the system always writes all infotype records of the object being transported and they are all transported.

So, if you transport an object, the system also transports all its infotype to the target system, and replaces any existing object that has the same ID. Of course the object's infotype records are also replaced. If the object does not already exist in the target system, the system creates it immediately with all transported infotypes. In other words, the system also creates all the object's relationships with other objects. The system warns you if objects to which your object is related do not exist.

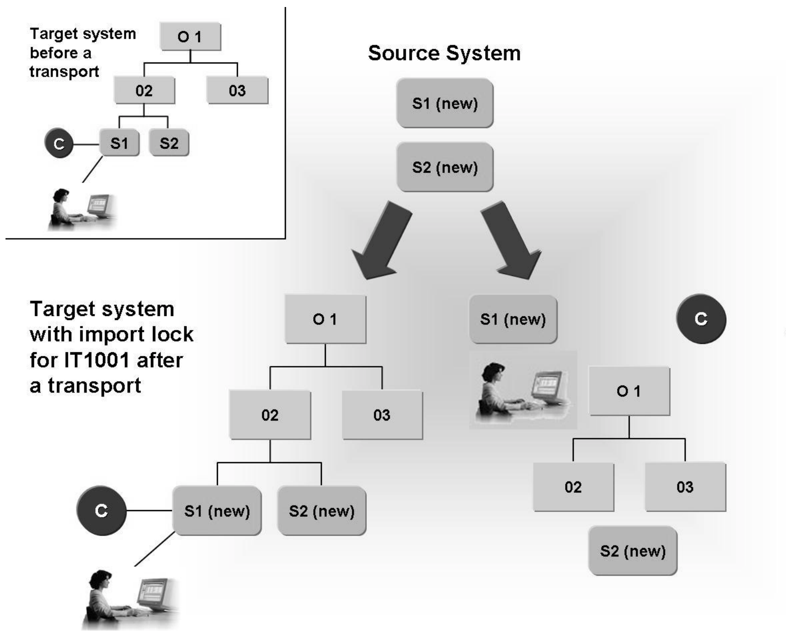


Figure 32: Import Lock

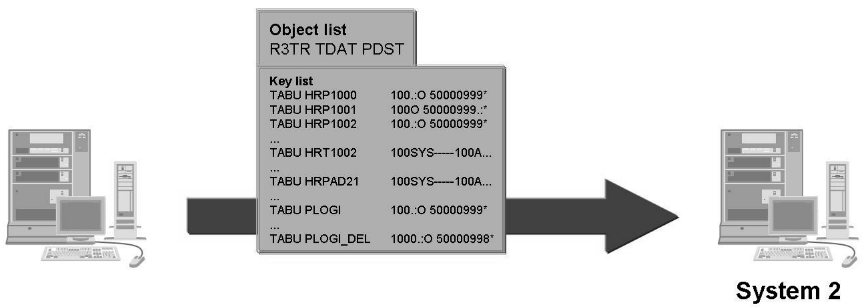
The most misunderstandings arise because if you transport an object type without relationships (often used for activity groups / roles), the system deletes all the relationships in the target system - for example to agents. Here, the system is just working according to „"system logic", in other words it replaces all objects with the corresponding transported object - as described above. However, the transported object had **no relationships**. Therefore, all existing relationships were replaced by **no relationships**.

For that reason, you can use an import lock in the target system to prevent the system overwriting certain infotypes with transported infotype records when that is not what you want. This is done using an entry in table T77TR, where you fill the Object Type, Infotype, and Subtype fields. In the example above, you would enter object type T, infotype 1001, and subtype A007. If you lock infotype 1000 of an object type against import, the import lock affects all infotypes of that object type.

Caution: If you maintain objects without relationships - that is, the objects have several infotypes but no IT1001 - in a test system, and you then transport the objects to the productive system, you must first protect the relationships in the productive system against import, otherwise they will be overwritten.

This could mean that you overwrite your organizational plan!

- **What types of transport connection are there?**



- **Automatic Transport Connection**
- **Manual Transport Connection**
- **Transport Over Object Lock**

Figure 33: Transport Connection for Organizational Management Objects

Transport connection means the ways of transporting between different R/3 systems. When you transport Organizational Management objects (OM objects), the system transports copies of table entries, which are activated in the target system by automatic subsequent processing. The activation in the target system uses the plan version **.: never use** . The reason for this is that the plan version names for the active plan version in the source and the target system do not necessarily have to be the same. In the target system, the freshly transported entries are activated in the plan version that is set to active there, in other words the integration plan version.

When transporting Organizational Management objects with their attributes, you have three options:

- Automatic transport
- Manual transport
- Transport Over Object Lock

External object types in Organizational Management, such as people or cost centers, are not transported. The system only creates relationships from OM object types to these objects in the target system if the objects exist in the target system too.

You select a transport connection in Customizing. IMG path: *Personnel management → Organizational management → Transport*.

- **Transport process for automatic transport connection**

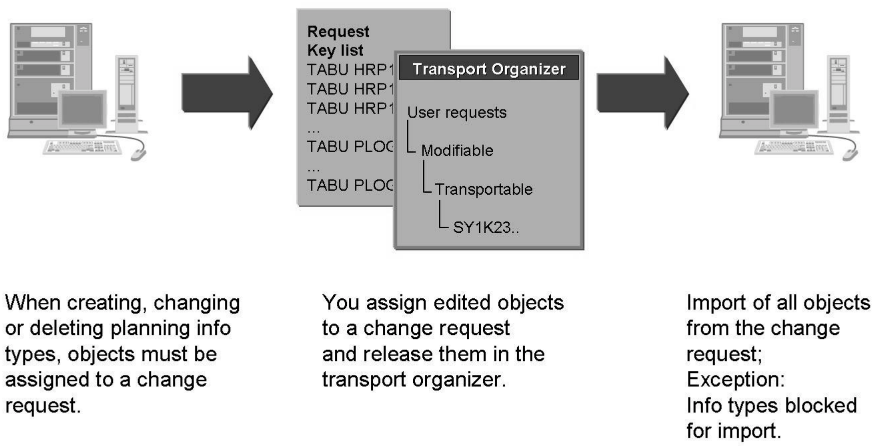


Figure 34: Automatic Transport Connection

A prerequisite for the automatic transport connection is that the automatic recording requirement in table T000 is activated in the source client.

Process:

- When you save planning objects in the active plan version, the system automatically displays a dialog box in which you enter a change request to which you want to assign the objects. If you do not assign the objects to a change request, you cannot save.
- In the Transport Organizer (transaction SE10 or SE09) you release the change request.
- The system transports all objects on the change request to the target system.

If you want to use this transport method, you must select *Automatic Transport* Connection Active in the Customizing activity *Set Up Transport Connection*.

To do this, enter the value ' ' (SPACE) (TRSP CORR = ' ').

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This type of transport connection is not recommended if you are building up a system from the start, as the system query regarding transport requests would constantly "hinder" users in their work.

- **Transport process for manual transport connection**

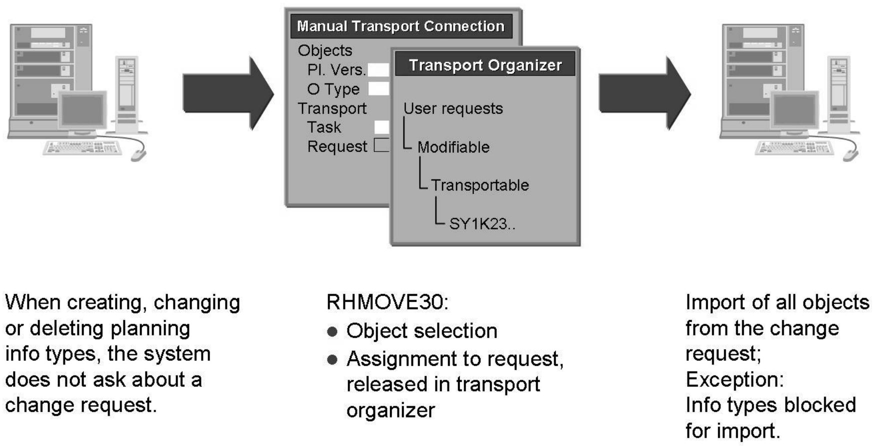

Figure 35: Manual Transport Connection

You edit planning objects, but the system does not ask for a change request when you save.

You start report RHMOVE30 (= manual transport) and select all the objects that you want to transport. You assign these objects to a change request. This report, and all report variants, only transports PD objects.

In the Transport Organizer (SE10 or SE09), you then release the change request, and the system imports all the objects on the change request into the target system.

If you want to use this transport method, you must select *No Automatic Transport Connection* in the Customizing activity *Set Up Transport Connection*.

To do this, enter the value 'X' (TRSP CORR = X). We recommend this type of transport connection if you are building up a system.

You can either start the report RHMOVE30 (manual transport) directly, or by performing the customizing activity Manual Transport.

Note the following: when you generate a request with the report RHMOVE30, you should immediately release it in transaction SE10, to avoid the danger of in-between changes due to the lack of recording requirement.

Using the parameter **DEL** you can specify that the system should delete the selected objects in both the target and the source system. The parameter **REPL** replaces the selected people with users and transports them as users to the target system.

- **Transport process for transport connection over object lock**

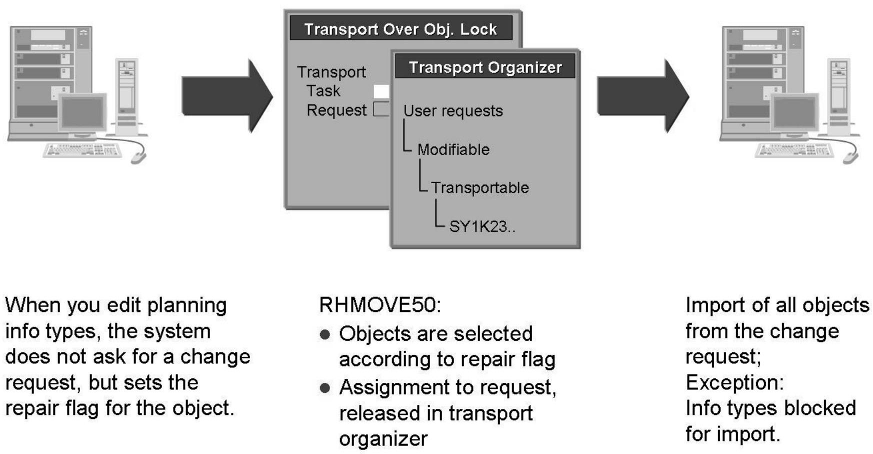

Figure 36: Transport Over Object Lock

Process:

1. You edit planning objects, but the system does not ask for a change request when you save. Instead, in the table PLOG or PLOGI_DEL (in the case of deleting operations), the system selects the Repair field for the changed object.
2. You start the report RHMOVE50 (= Transport Over Object Lock).
3. You choose a change request. All objects that you changed or deleted (in other words, all objects for which the system set the repair flag in table PLOGI or PLOGI_DEL) are written to this request. At the same time, the system resets the repair flag in the tables PLOGI and PLOGI_DEL.
4. In the Transport Organizer (transaction SE10 or SE09) you release the change request.
5. The system transports all objects on the change request to the target system.

If you want to use this transport method, you must select *Transport over Object Lock* in the Customizing activity *Set Up Transport Connection* .

To do this, enter the value 'T' (TRSP CORR = T).

- **Further transport of Organizational Management objects**

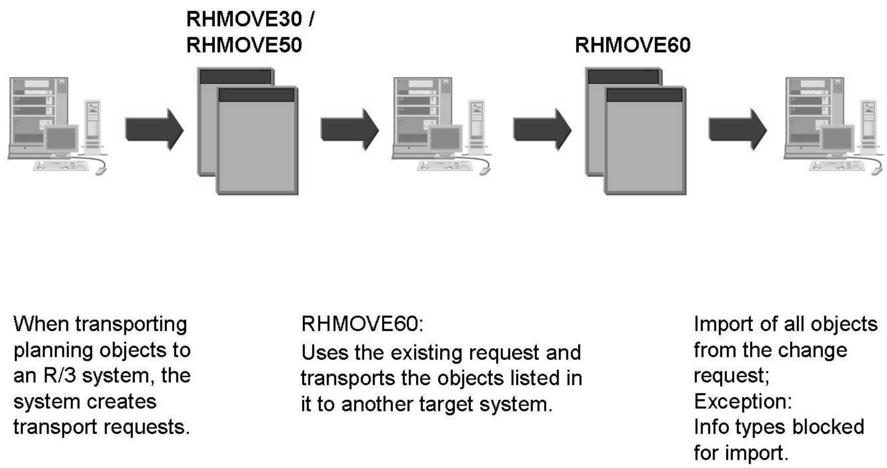

Figure 37: Further Transport

If you want to transport objects across several systems, you can use the report **Transport Planning Objects (RHMOVE60)**. With this report you can move all objects from an “incoming request” to an “outgoing” request.

Process:

On the input template, you enter the old request number and then the new number that you want to use.

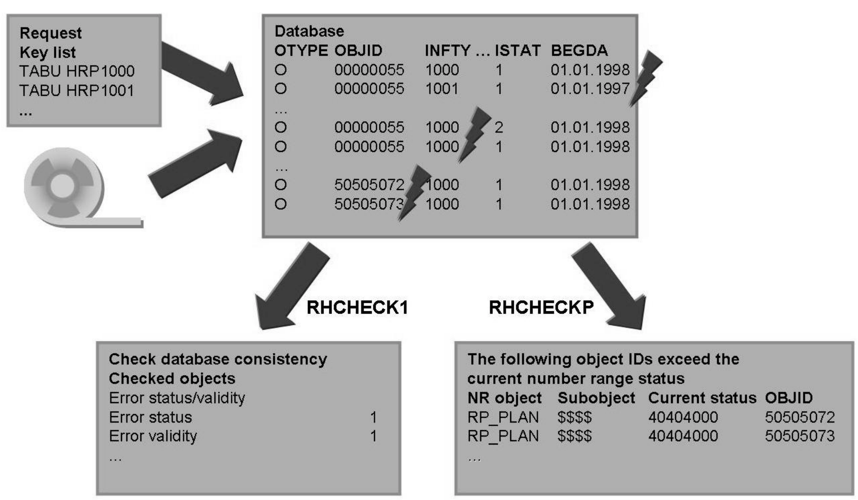

Figure 38: Consistency Check After Data Transfer and Transport

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After you have performed a data transfer or transport, you can use the following reports to check consistency:

The report **RHCHECK1** checks the consistency of the planning data records:

- Infotype validity within object validity
- Infotype status versus object status
- Existence of the inverse relationship

  You can create missing inverse relationships using the report RHCHECKV.

The report **RHCHECKP** performs the following checks:

- Consistency and uniqueness checks for table and additional data pointers
- Number range checks: if the system displays inconsistencies during the number range check, you must update the number range status.

In addition, you can start the following reports to check consistency:

- **RHCHECKV** checks whether inverse relationships are complete
- **RHCTIMCO** checks the consistency of time constraints
- **RHCHECKRELATIONS** deletes relationships for which no object exists.

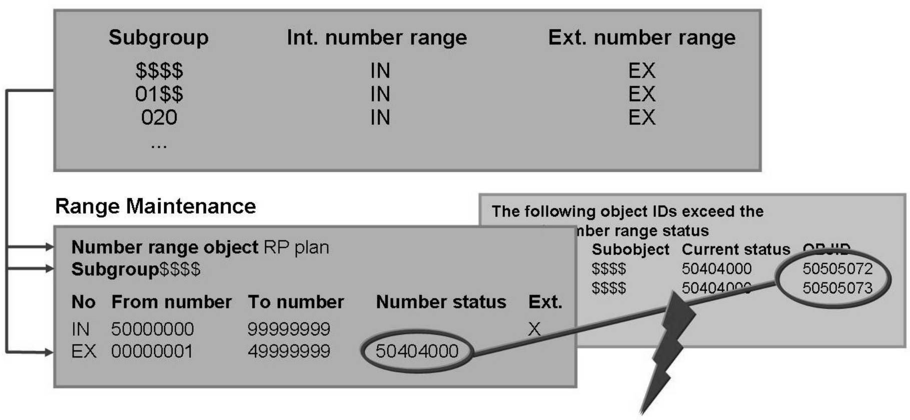

Figure 39: Update Number Range Status

A data transfer or transport can lead to inconsistencies in the number range status. In other words, object IDs exist that are higher than the current number range status of an internal number range. In that case, you must update the current number range status in the affected ranges manually.

You update a number range status in the Customizing activity Maintain Number Ranges (Implementation guide: *Personnel Management → Organizational Management → Basic Settings → Maintaining Number Ranges*).

Exercise 6: Transports in Organizational Management

Exercise Objectives

After completing this exercise, you will be able to:

- work with the manual transport connection
- work with transports using the object lock

Business Example

You want to transport the organizational structure from one SAP system to another.

Task:

1. Create a transport request for the following example structure in plan version 01 using a manual transport connection.

   - Plan Version = '01'
   - Object Type = 'O'
   - Object ID = '00000001'
   - Display Depth = '2'

   Hint: Check the request in transaction SE10 **Transport Organizer**.

2. Create an additional transport request for your organizational unit **## Executive Board** using a transport over object lock. What value must the transport switch in transaction OOCR **Set Up Transport Connection** have in this case? In your organizational unit, create an additional organizational unit and two subordinate positions. Here too, check the request in transaction **SE10** Transport Organizer. If necessary, check for your objects in requests belonging to other groups.

Solution 6: Transports in Organizational Management

Task:

1. Create a transport request for the following example structure in plan version 01 using a manual transport connection.

Continued on next page

- Plan Version = '01'
- Object Type = 'O'
- Object ID = '00000001'
- Display Depth = '2'

Hint: Check the request in transaction SE10 **Transport Organizer**.

a) Start the report RHMOVE30 for the following structure, by choosing *IMG → Personnel Management → Organizational Management → Transport → Manual Transport→*.

   - Plan Version = '01'
   - Object Type = 'O'
   - Object ID = '00000001'
   - Evaluation Path = 'ORGEH'
   - Display Depth = '2'
   - Test = ' '

   In RHMOVE30, in the **Task** field, create a Customizing request and activate the **Transport Objects** setting.

   Check the request in transaction **SE10 Transport Organizer**. You can also access the transport organizer by choosing *SAP Easy Access→ Tools→ Administration→ Transports→ Transport Organizer*. In the transport organizer, display your transport request and check the infotypes you want to transport in the tree structure.

2. Create an additional transport request for your organizational unit **## Executive Board** using a transport over object lock. What value must the transport switch in transaction OOCR **Set Up Transport Connection** have in this case? In your

Continued on next page

organizational unit, create an additional organizational unit and two subordinate positions. Here too, check the request in transaction **SE10** Transport Organizer. If necessary, check for your objects in requests belonging to other groups.

a) To execute the transport over object lock, you must set the value of the transport switch in **transaction OOCR**(*IMG →Personnel Management→Organizational Management→ Transport →Set Up Transport Connection*) to '**T**'.

   When you have created the example structure in plan version 01, start the report RHMOVE50 with the parameter Test = ' ' by choosing ***→System → Services → Reporting***. Depending on when each group finished maintaining its structure and started report RHMOVE50, the objects of one group can appear on requests belonging to other groups. Search for your organizational objects using transaction **SE10, Transport Organizer**.

Lesson Summary

You should now be able to:

- Set up the transport connection for organizational objects
- Understand the principle underlying the transport
- Use reports to create a transport request for organizational objects

Unit Summary

You should now be able to:

- Set up the transport connection for organizational objects
- Understand the principle underlying the transport
- Use reports to create a transport request for organizational objects

Course Summary

You should now be able to:

- Add customer object types and relationships to the Organizational Management data model,
- Customize Manager's Desktop and the Organization and Staffing interface and add new object types and relationships to them,
- Set up and understand Workflow in Organizational Management

Appendix 1

Paths for HR506

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Unit 2 Enhancing the Data Model

Topic (Transaction)	**Path**
Path to IMG (SPRO)	*SAP Easy Access → Tools → Customizing → IMG → Project Managment → SAP Reference IMG*
Creating new object types (OOOT)	*IMG → Personnel Management → Organizational Management → Basic Settings → Data Model Enhancement → Maintain Object Types.*
Assigning infotypes to new object types (OOIT)	*IMG → Personnel Management → Organizational Management → Basic Settings → Data Model Enhancement → Infotype → Maintenance → Maintain Info Types.*
Defining new relationships and maintaining time constraints and allowed object types (OOVK)	*IMG → Personnel Management → Organizational Management → Basic Settings → Data Model Enhancement → Relationship Maintenance → Maintain Relationships.*

Topic (Transaction)	Path
Maintaining subtypes (OOSU)	*IMG → Personnel Management → Organizational Management → Basic Settings → Data Model Enhancement → Infotype Maintenance → Maintain Subtypes.*
Maintain evaluation paths (OOAW)	*IMG → Personnel Management → Organizational Management → Basic Settings → Maintain Evaluation Paths*
Checking consistency of the data model - RHCHECK0	*SAP menu → System -> Services -> Reporting (SA38); enter RHCHECK0 and choose Execute; or: IMG -> Personnel Management -> Organizational Management -> Basic Settings -> Data Model Enhancement -> Check Consistency of Installation → Execute.*

Unit 3 Customizing the Hierarchy Framework

Topic (Transaction)	Path
Displaying technical information in the hierarchy framework (SU03)	*SAP menu → System → User Profile → Own data → Parameters →*
Displaying the *object manager scenario*	Enter **OM_OBJM_SCEN_DISPLAY** + save this
Identify column groups for column framework	Enter **OM_ARRAYTYPE_DISPLAY** + save this; Use the *Column Group* icon and the *Technical Information* button.
Displaying the framework used in the *work area*	Enter **OM_FRAM_SCEN_DISPLAY** and save
Displaying the technical name on the tab page in the detail area	Enter **OM_TABTYPE_DISPLAY** + save.
Customizing the *object manager* (SPRO)	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Object Manager*

Topic (Transaction)	Path
Create your own search nodes in *Object Manager* (Scenario for Organization and Staffing = OMEOO0)	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Object Manager → Define Own Search Nodes → Search Nodes Definition → New Entries*
Adjusting the *search area* → adding your own search node to the scenario	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Object Manager → Adjust Search Area → Add Additional Node to Search Area → New Entries* (as column group, you can use NF_STO here)
Customizing search nodes	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Object Manager → Adjust Search Area → Adjust Search Node → New Entries* (Standard interaction tool for the Organization and Staffing interface `CL_HR_OM_IAT_ORGP`)
For structure search: Maintain evaluation paths (OOAW)	*IMG → Personnel Management → Organizational Management → Basic Settings → Maintain Evaluation Paths*
For structure search: specifying an evaluation path for an object type (OOOT)	*IMG → Personnel Management → Organizational Management → Basic Settings → Data Model Enhancement → Maintain Object Types → Structure Search.*
Changing the column framework	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Column Framework .....*
Defining a new service in the overview area	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Object Type → Display Object Type in Structural Overview Object → Define Your Own Service for Structural Overview Object → Definition Service → New Entries* (for the hierarchy framework use the object key GOWD - general overview with detail)

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Topic (Transaction)	Path
Defining the attributes of the new service	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Object Type → Display Object Type in Structural Overview Object → Define Attributes of Structural Overview Object for Your Own Service* Select the service under *Definition Service → New Entries* ; (use the column group NF_GEN_OV (general overview) and the header type ORGSTRUC).
Defining the request over which the system calls the overview object	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Object Type → Display Object Type in Structural Overview Object → Define Your Own Request →* Select the scenario under *Scenario Definition → New Entries*. Define your own request for the scenario OME0 with the service DETAIL (GENERAL) as the Service for the Second Interface Object.
Specifying which object type uses which request	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Object Type → Display Object Type in Structural Overview Object → Assign Your Own Request to an Object Type → New Entries.*
Adjusting tab pages	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Object type → Display Object Type in Detailed Area → Define Own Tab Pages →*

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Topic (Transaction)	Path
Generating a subscreen with screen 7000 (PPCI)	*Call transaction PPCI → Enter Infotype → Create; Menu Infotype → Create Subscreen → Confirm prompt.*
Entering a subscreen for an infotype	*Menu System → Services → Table Maintenance → Extended Table Maintenance (SM30); Enter T77ID and choose → Change*; select each IT and enter 7000 under Subscreen;
Adding an infotype as a tab page	*IMG → Personnel Management → Organizational Management → Hierarchy Framework → Integrate New Infotype* 1. Define Your Own Tab Page 2. Add Your Own Tab Pages to an Existing Tab Page Group

Unit 4: Customizing Manager's Desktop

Topic (Transaction)	Path
Path to IMG (SPRO)	*SAP Easy Access → Tools → Customizing → IMG → Project Managment → SAP Reference IMG*
New logo, new background image	*IMG → Personnel Management → Manager's Desktop → Customer Adjustment → Adapt Initial Screen → Execute → Binary Data → ICON Search → No Entries → Execute → on the SAP WEB repository screen choose → Create → Enter Object Names and Description (Customer namespace Z...) → Import*
Creating a new scenario	*IMG → Personnel Management → Manager's Desktop → Customer Adjustment → Specify Scenario-Specific Settings → Specify Application Scenarios → Choose and make entries (customer namespace Z...)*
Defining tab pages (subsequent evaluation paths)	*IMG → Personnel Management → Manager's Desktop → Customer Adjustment → Determine Views of the Organizational Structure → Determine Views (Evaluation Paths).*

Topic (Transaction)	Path
Creating new function codes (fastest way; all necessary actions are called up in order, otherwise also manual execution using the next two table entries)	*IMG → Personnel Management → Manager's Desktop → Enhancement of Function Codes → Wizard for Defining Function Codes → Work Through Wizard*
Creating new function codes (by hand) Step 1	*IMG → Personnel Management → Manager's Desktop → Enhancement of Function Codes → Define Function Codes → Execute → New Entries → Enter*
Step 2 Embedding the function code in a structure	*IMG → Personnel Management → Manager's Desktop → Enhancement of Function Codes → Define Structure of Function Codes → Define Function Code Hierarchies → New Entries.*
Hiding existing function codes (slimming down scenarios) / changing the order of function codes	*IMG → Personnel Management → Manager's Desktop → Enhancement of Function Codes → Define Structure of Function Codes → Change Arrangement of Function Codes → Choose and make entries.*

Unit 5 Workflow and Organizational Management

Topic (Transaction)	Path
Path to IMG (SPRO)	*SAP Easy Access → Tools → AcceleratedSAP → Customizing → Project Managment → SAP Reference IMG*
Business Workflow (general)	*SAP Easy Access → Tools → Business Workflow*
Business objects (SWO1)	*SAP Easy Access → Tools → Business Workflow → Development → Definition Tools → Business Object Builder*
Process level workflow builder (SWDD)	*SAP Easy Access → Tools → Business Workflow → Development → Definition Tools → Workflow Builder → Workflow Builder → Workflow Builder*
Process level; display single-step tasks, workflow template, and so on (PFTC_DIS)	*SAP Easy Access → Tools → Business Workflow → Development → Definition Tools → Tasks / Task Groups → Display*

Topic (Transaction)	Path
Calling table T77INT	Transaction SE16
Agent Assignment for the *Workflow for Organizational Change*: Assign manager 2	*IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) Assign Agents to Tasks → Execute Designated Personnel Action → Specify Position in New Department.* Assign all potential users (managers) to the standard tasks, and generate an index.
Agent Assignment for the *Workflow for Organizational Change*: Assign agent from Tab.T526	*IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Workflow for Organizational Change (WS01000014) Assign Agents to Tasks → Execute Designated Personnel Action → Specify Position in New Department.* Assign all potential users (managers) to the standard tasks, and generate an index.
Event linkage for the *Workflow for Organizational Change*	*IMG → Personnel Management → Organizational Management → Integration → Integration with Personnel Management → Workflow for Organizational Change (WS01000014) → Activate Event Linkage → Execute Designated Action → Expand; Create Designated Org. Change → Activate.*
Activate event linkage in tab. T77INT	*Manager's Desktop (PPMDT)* *Organization and Staffing (PPOME)*

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Topic (Transaction)	Path
Transferring an employee in Organizational Management using an action	*Personnel Management → Organizational Management → Infotype Settings → Activate/Deactivate "Vacancy" Infotype.*
Workflow Create / Delimit Vacancy	*IMG → Personal Management → Organization Management → Integration → Integration with Personnel Administration → Workflow Message about New Employee (WS01200136) or under Personnel Management → Manager's Desktop → Organizational Changes → Workflow Message about New Employee (WS01200136)*
Generating events during infotype updating in PA	*IMG → Personnel Administration → Tools → Business Workflow Events*

Unit 6 Transports in Organizational Management

Topic (Transaction)	Path
Path to IMG (SPRO)	*SAP Easy Access → Tools → Customizing → IMG → Project Managment → SAP Reference IMG*
Import lock (tab. T77TR	*IMG → Personnel Management → Organizational Management → Transport → Lock Infotypes for Import*
Setting up a transport connection (OOCR)	*IMG → Personnel Management → Organizational Management → Transport → Set Up Transport Connection; Values: X = no automatic transport, T = transport over object lock; (empty)= automatic transport.*
Manual transport connection (RHMOVE30)	*IMG → Personnel Management → Organizational Management → Transport → Manual Transport → execute*
Transport Organizer (SE10)	*SAP Easy Access → Tools → Administration → Transports → Transport Organizer*

Topic (Transaction)	Path
Transport over object lock (RHMOVE50)	*SAP Easy Access → System → Services → Reporting → Enter RHMOVE50 and choose Execute.*
Further transport (RHMOVE60)	*SAP Easy Access → System → Services → Reporting → Enter RHMOVE60 and choose Execute.*
Updating number ranges	*IMG → Personnel Management → Organizational Management → Basic Settings → Number Range Maintenance → Maintain Number Ranges*

Important R/3 Notes on Transporting Organizational Objects:

R/3 Note Number	Short Text	Component
0048964 from 01/29/2000	PD integration and transport connection	BC-BTM-OM, Organizational Management
Content: Differences in post-transport processing for achieving consistency between OM and PD before and after release 4.5a. Key words: RHINE10, RHINTE30, RHWFAKTI.		
0138411 from 30.01.03	Composite note: transports in Organizational Management	BC-CTS Change and Transport System
Content: General information on transporting PD objects; recommendations for transporting PD objects.		

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Feedback

SAP AG has made every effort in the preparation of this course to ensure the accuracy and completeness of the materials. If you have any corrections or suggestions for improvement, please record them in the appropriate place in the course evaluation.

