SAP/HR-Payroll Annual Salary Review (ASR)
Customizing the Layout of the Employee Overview Window

Introduction

In response to the feedback received from the ASR training sessions, this new quick card was developed to show you how to customize the layout of the ASR Employee Overview window in a way that makes it easier for you to process your department's review. Specifically, you can:

- Choose which data columns you want displayed on the window

- Change the left to right order in which columns are displayed

- Change the sort order by which the employee records are listed

- Create totals and subtotals

- Save your changed layout for future use

Layout Button

Data Columns contain field information about the employees. You can use the Layout features to add or remove columns from the display. You may also change the left-to-right sequence of columns.

Sorting controls the order in which the employee records are listed. You can use the Layout features to sort these records by criteria in one of many columns.

Totals and **Subtotals** can be created for numeric fields.

Layout button provides access to layout control options which allow you to save a customized layout or used previously saved layouts.
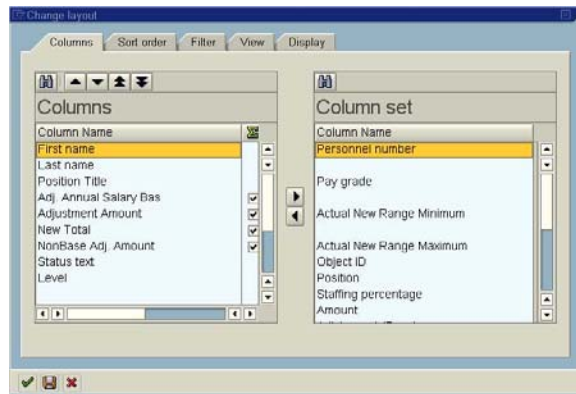
Change Column Layout

The following steps show you how to change the column layout of the Annual Salary Review – Employee Overview window.

1. Display the Annual Salary Review – Employee overview window.

2. Click the down arrow in the **Select Layout** button ⊞ to display a drop down menu of layout options.

3. Select **Change Layout** to display the Change Layout dialog box, as illustrated below.

    The **Columns** tab in the Change Layout box allows you to choose which columns to display on the Overview window and their left-to-right sequence.

Columns panel lists the data columns presently being displayed on the Employee Overview window. Columns are listed in their left to right sequence

Column Set panel lists those columns which you can add to the Employee Overview Window.

4. Make your changes to the column layout.

Add Column	In the Column Set panel, select the column you wish to add and click ◀.
Remove a Column	In the Columns panel, select the column you wish to remove and click ▶.
Move Column	In the Columns panel, select the column you wish to move, then click the ▲ or ▼ arrow (above the heading, "Column") to move the column 1 position at a time. The double arrows let you move a field to the very top of bottom or bottom of the list.
Add/Remove Column Totals	To show totals for numeric fields, click the column's checkbox. Un-checking the box turns off the totaling.

5. Click ✔ to use the changed settings.

    You can make further changes to your layout until you are satisfied with it.

    Your changed settings will remain in effect while you remain in the Employee Overview window, but your settings will be lost when you exit the window *unless* you first save the layout.
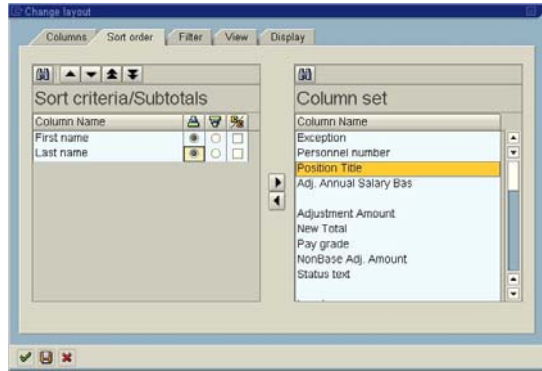
Change Sorting

The following steps show you how to change the sorting of employee records on the Annual Salary Review – Employee Overview window.

1. Display the Annual Salary Review – Employee overview window.

2. Click the down arrow in the **Select Layout** button ⬚🖳 to display a drop down menu of layout options.

3. Select **Change Layout** to display the Change Layout dialog box, as illustrated below.

    Click on the Sort Order tab. This tab allows you to control the sorting of the employee's listed on the Overview window.

Sort Criteria/ Subtotals panel lists the columns by which data is being sorted. In this example, sorting will be by First Name, then Last Name.

Column Set panel lists columns available for use as Sort Criteria.

4. Make your sorting changes.

Add a New Sort	In the Column Set panel, select the column and click ◀.
Remove a Sort	In the Sort Criteria select the column and click ▶.
Control Column Sorting Sequence	In the Sort Criteria panel, select the sort criteria column you wish to move. Click the ▲ or ▼ (above the heading, "Sort criteria/Subtotals) to move the column 1 position at a time. The double arrows let you move a field to the very top of bottom or bottom of the list.
Control Sort Order within a Column	To sort data in ascending (1-9 then A-Z) order, click the radio button ◉ beneath the Ascending Sort 🔼 icon. To sort column data in descending, Z-A then 9-1 order, click the radio button ◉ beneath the Descending Sort icon 🔽.
Create Subtotals and Totals	To create subtotals each time a sort column's value changes, click the column's checkbox located beneath the Totaling/Subtotaling icon 🔢. Subtotaling a column automatically generates a grand total for the column.

5. Click ✔ to use the changed sort settings.

    You can make further changes to your layout until you are satisfied with it. Your changed settings will remain in effect while you remain in the Employee Overview window, but your settings will be lost when you exit the window *unless* you first save the layout.

Save as a New, User-Specific Layout

After you customize a layout, you may save the layout for your future use as follows:

1. From the Annual Salary Review – Employee overview window, click the down arrow in the **Select Layout** button ▦▤ to display a drop down menu of layout options.

2. Select **Save Layout** to display the Save Layout dialog box.

3. In the Save layout dialog box, replace the slash [/] in the Save Layout field with a unique ID. (The ID should begin with the cycle acronym; e.g., ADM, SPT, FAC, etc.). Enter a description in the Name field.

4.Click in the **User-specific** checkbox (below the Name field).

IMPORTANT: At the bottom of the screen, be sure that the **User Specific** checkbox is checked, and **Default Setting** checkbox is UNchecked. Otherwise, you risk either overwriting the provided layouts, or setting your current layout as the layout that every ASR user will see, regardless of the cycle.
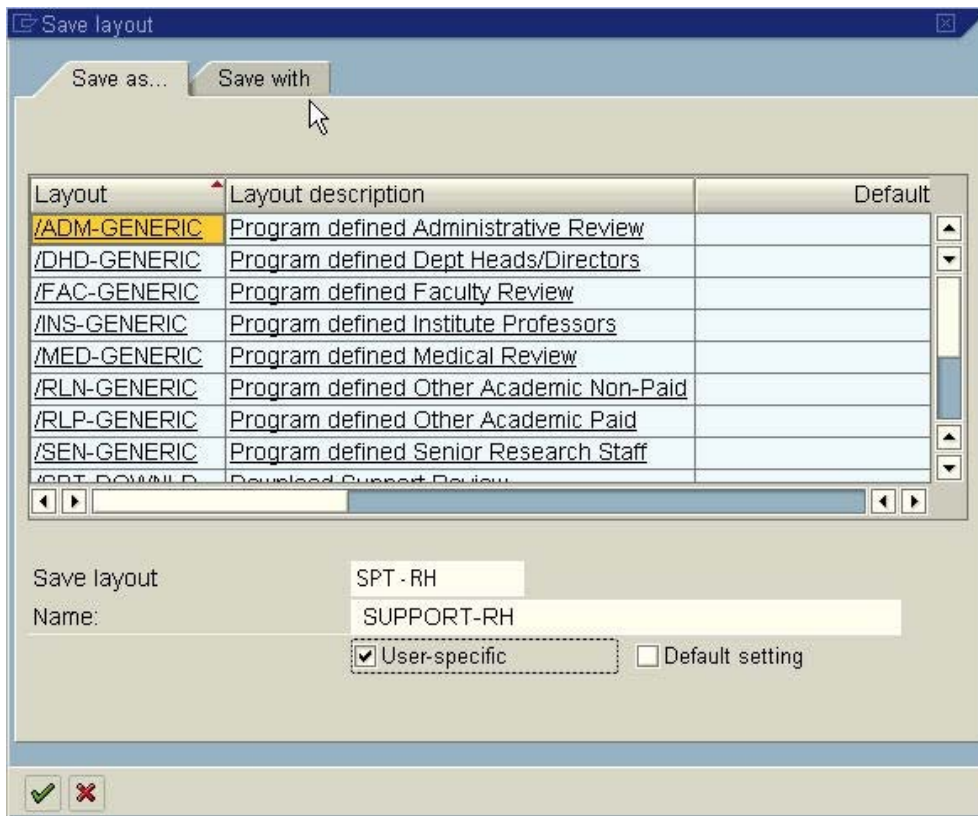
5. Click ✔ to save.

Switch to a Saved Layout

1. Display the Annual Salary Review – Employee overview window.

2. Click the down arrow in the **Select Layout** button [icon] to display the menu of layout options.

3. Choose **Select Layout** to display the Choose Layout dialog box, as illustrated below.
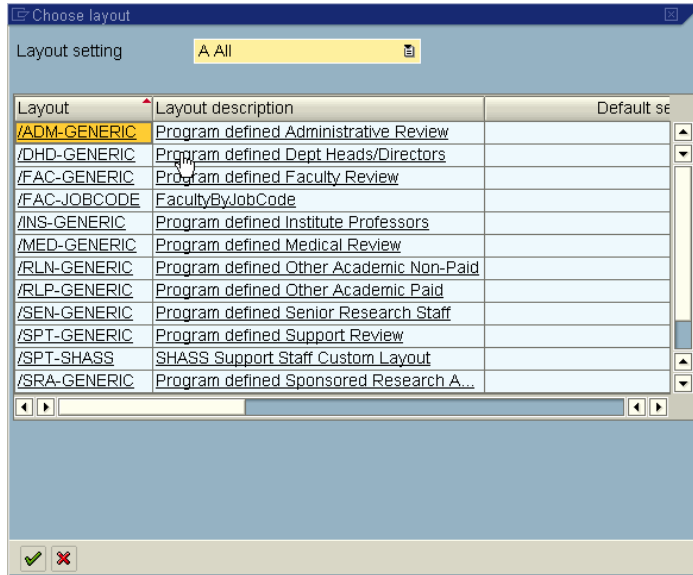
4. Click on the desired **Layout** – SAP will now display the employee records with the selected layout.

Revise a User-Specific Layout

After you have created and saved a user-specific layout, you may revise it as follows.

1. Select the saved layout you wish to revise, as described above.

2. In the Employee overview window, click the down arrow in the **Select layout** button 🔲 to display a drop down menu of layout options.

3. Select **Change Layout** to display the Change layout dialog box.

4. Revise the layout as you wish.

5. In the Change layout dialog box, click 💾 (in the lower left) to save the changes.

6. Confirm that (a) the Save Layout field shows the user-specific layout you are revising and (b) the user-specific checkbox is checked.

7. Click ✔ to continue.

8. In the "Layout already exists" dialog box, click **Yes**.

IMPORTANT: <u>DO NOT</u> overwrite any layout other than your user-specific layouts.

9. Click ✔ to display employee records in saved layout.