

 Show All

# Organizational Work Distribution Quick Guide

The *Organizational Work Distribution* view enables you to manage the distribution of work within your organization by creating work distribution rules that allow the system to evaluate work items and to determine the org unit responsible for these work items. Depending on the work category, the system directs the work item to the determined org unit, or provides the org unit as a proposal in the relevant business document.

You can access this view from the *Organizational Management* work center under *Work Distribution*.

## ▼ Business Background

### ▼ Work Distribution

Work distribution defines the process of assigning work to an org unit or employee. By default, work items in SAP Business ByDesign are visible to all users that have the corresponding access rights. However, for some business processes the org unit or employee responsible for a work item has to be determined. For these areas, you can define work distribution rules that enable you to automatically assign business documents and tasks to dedicated org units or employees.

For more information, see [Work Distribution](#).

### ▼ Work Categories

The work category is the central element for work distribution. A work category represents a specific part of work in a business area and is related to one or more business documents. Each work category provides parameters that you can use to define work distribution rules, according to which the system determines the responsible org unit or employee for a business document.

For more information, see [Work Categories](#).

## ▼ Tasks

### ▼ Create a Work Distribution Rule



1. In the *Organizational Work Distribution* view, select a work category.
2. Click .



You cannot change work distribution for past dates. If the  button is disabled, check the *Effective Date* and ensure that you have not entered a date that occurs in the past.

3. Choose , then click .

If you want to copy an existing rule, click .

The system processes work distribution rules for organizational work distribution along their priorities. If you have maintained multiple rules for a work category, the system only uses the first

rule that applies to the properties of the evaluated business document. By adding a rule you are creating a new rule that is added to the bottom of the list. If you wish to insert a rule of a higher priority, then change priority by moving the rules up and down in the table.

4. Enter the name of the rule.
5. Enter the ID of the responsible org unit.
6. Enter the validity period of the rule.

**i** If you change or delete a work distribution rule that begins before the effective date, the rule is only valid to the date before the effective date. If you only change the rule, the system creates a new rule based on the existing rule and includes the changes you make. The new rule is valid as of the effective date.

7. Go to the *Rule Details* section and specify the parameters for the rule.

Each parameter appears as a tab, for example, . Using the parameters, you can specify exactly both which parameter is to be included in the rule or excluded from the rule.

8. Click  to verify whether your rule is consistent.
9. Click  or .

#### ▼ Delete a Work Distribution Rule


1. In the *Organizational Work Distribution* view, select a work category.
2. Click .

**i** You cannot change work distribution for past dates. If the  button is disabled, check the *Effective Date* and ensure that you have not entered a date that occurs in the past.

3. Choose .
4. Select the work distribution rule you want to delete and click .
5. Click  or .

#### ▼ Set a Work Category to Global Work Distribution

1. In the *Organizational Work Distribution* view, select a work category that has the status *Defined Work Distribution*.
2. Click  and select the option *Set to Global Work Distribution*.

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